Request for Quotations

HePS Reference Guide

This abbreviated version of the *HePS Request for Quotations Reference Guide* covers only the essential basics of creating, amending, and awarding a small purchasing Request for Quotation. It is not intended to cover all the functions of the HePS system nor explain all of the options or variations available to a buyer. A comprehensive **Buyer Manual** is available online within the HePS system, located under the **Main** tab on the menu bar.

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Part 1 - Creating and Releasing an RFQ

This section covers filling out basic header information (due dates, delivery and billing address), choosing and customizing the product or service (including attachments), selecting vendors, adding solicitation instructions and the response due date, and releasing the solicitation to the internet.

To begin, click on the **Create a Solicitation** Icon and choose **RFQ** from the popup

The Solicitation Header has 7 Steps. Placing your cursor on the Step number will provide an explanation in a popup.

Step 1 – Optional Document Tracker Information – numbers or text

Step 2 – Optional Contact person for this solicitation – buyer is the default

Step 3 – Required Delivery Date or Start and End of Contract

Optional Priority – Normal or Rush flag will appear on emails to approvers

Freight and FOB information, the standard default is already set

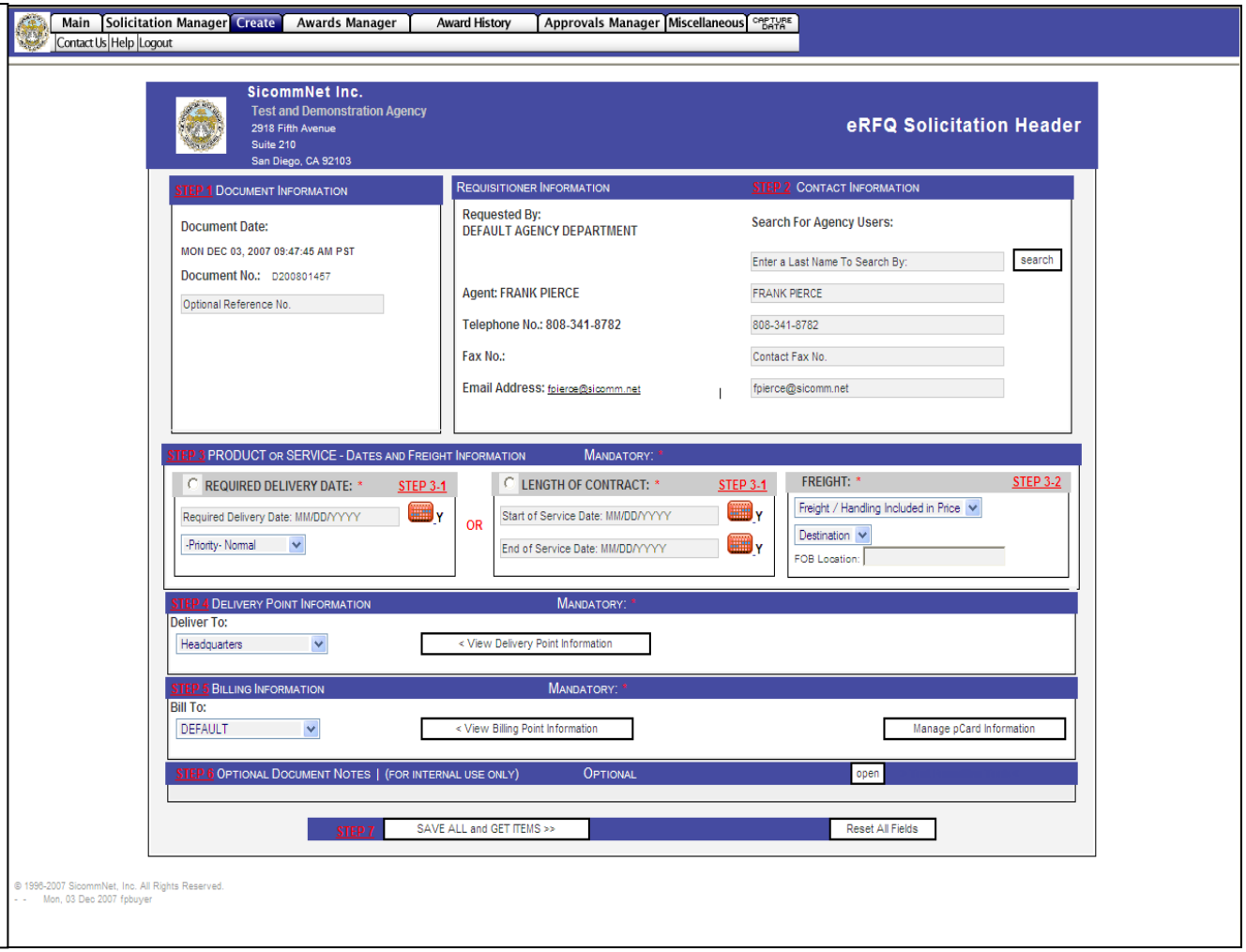
Step 4 – Choose a Delivery Point or Create a New One from the drop down – Click on button to view info

Step 5 – Choose a Billing Point or Create a New One from the drop down – Click on button to view info

Optional P-Card Information

Step 6 - Optional Internal Notes

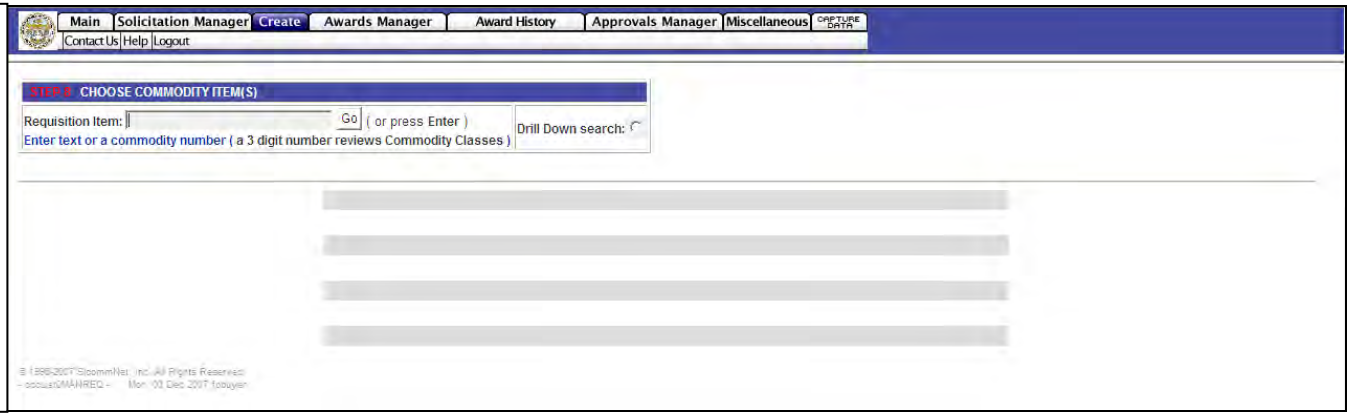
Step 7 – Save and Get Items



Step 8 – Choose a product or service that you are procuring by typing in a word and clicking on GO (or enter)

This will display all the instances where the word appears in the commodity coding system. Codes are used to identify which vendors will be sent notification of the solicitation

You may also enter the commodity code number if you know what it is.

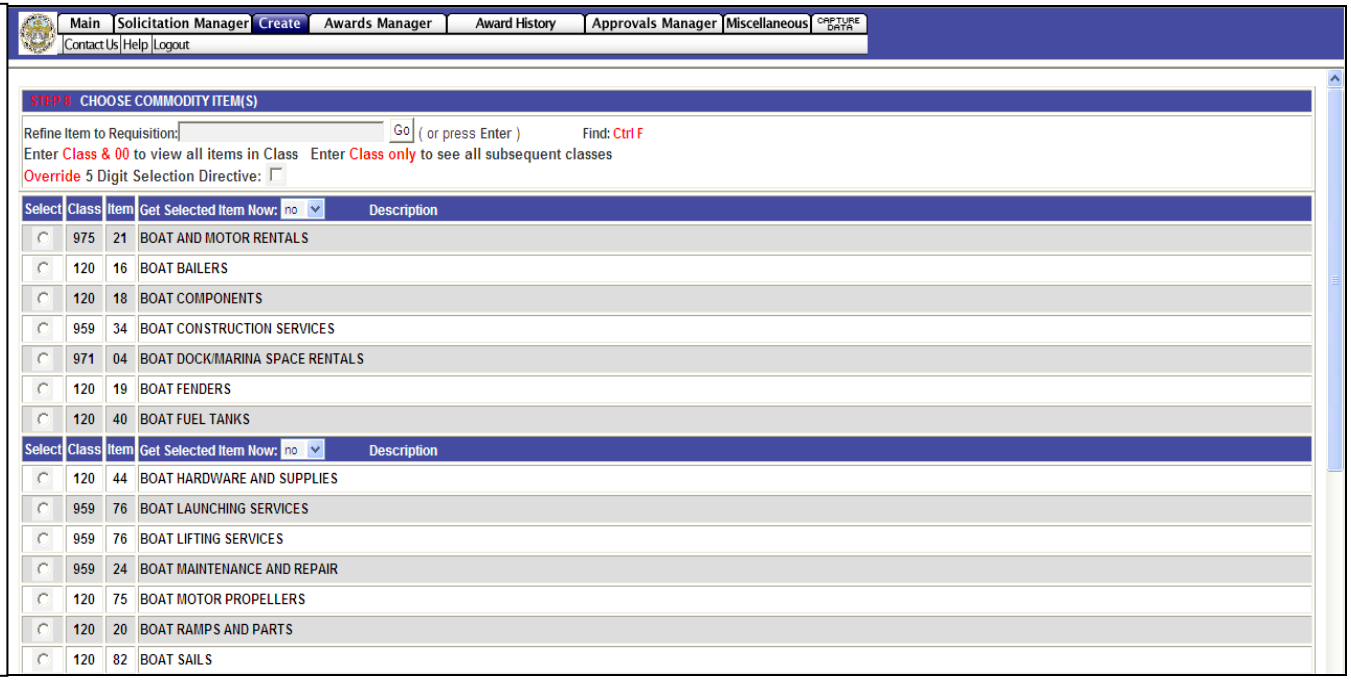


Step 8 continued – Select the appropriate item or service. In most cases the system will continue to drill down and show you more details

You may stop the search by changing the **Get Selected Item Now** to **YES**

The description you have chosen will be placed back into the form for your customization, it does not have to be exactly what you want at this time, just the right general category

Commodity Codes 001 through 899 are products – Commodity Codes 900 through 999 are services. The purpose of the coding is for the system to identify which vendors will get the email notification



Select	Class	Item	Get Selected Item Now: no	Description
	975	21		BOAT AND MOTOR RENTALS
	120	16		BOAT BAILERS
	120	18		BOAT COMPONENTS
	959	34		BOAT CONSTRUCTION SERVICES
	971	04		BOAT DOCK/MARINA SPACE RENTALS
	120	19		BOAT FENDERS
	120	40		BOAT FUEL TANKS
Select	Class	Item	Get Selected Item Now: no	Description
	120	44		BOAT HARDWARE AND SUPPLIES
	959	76		BOAT LAUNCHING SERVICES
	959	76		BOAT LIFTING SERVICES
	959	24		BOAT MAINTENANCE AND REPAIR
	120	75		BOAT MOTOR PROPELLERS
	120	20		BOAT RAMPS AND PARTS
	120	82		BOAT SAILS

Step 9 - Enter a Quantity and Unit of Measure – you may change the unit of measure using a drop down list

Now that a quantity has been entered you can split the items to various delivery locations – Click on the Alternate Line Item Delivery Point button to split quantities and assign new Delivery Points

Enter the Estimated Total Price of the item or service – for internal use only, not seen by vendors

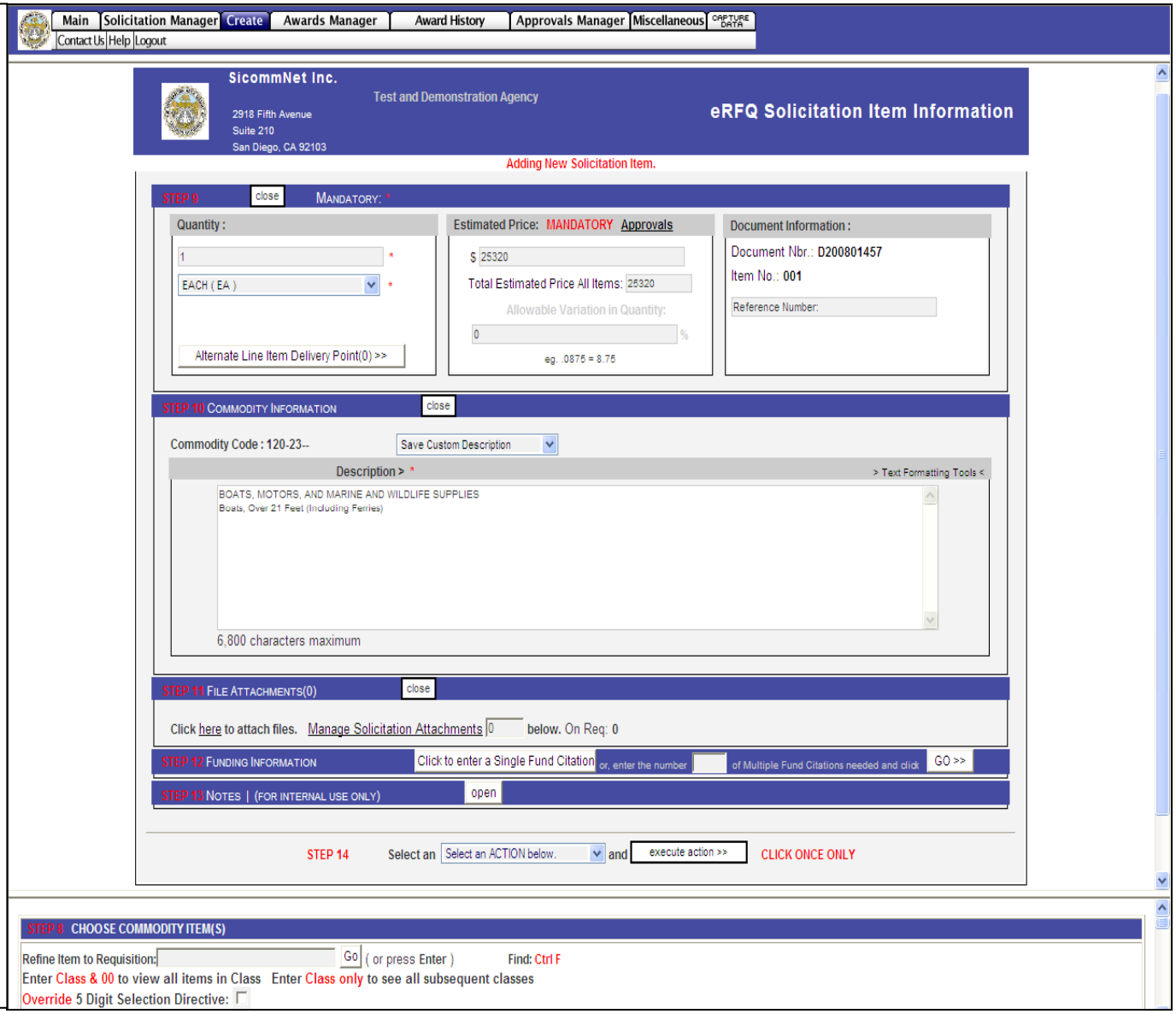
Optional Allowable variation in Quantity may be entered

Optional tracking number for the item may be entered

Step 10 – Customize the description, up to 6,800 characters may be used (about one page in a word document) to describe the item or service

The custom description may be saved for future use by using the **Save Custom Description** drop down - Select **YES** to save

If the commodity code is not correct, you may choose another one by starting a new search in the bottom frame



Step 11 - Optionally, you may add attachments by clicking on the Click **here** to attach files link

Click **Browse** and find your files

Enter in a description for the file in the space indicated

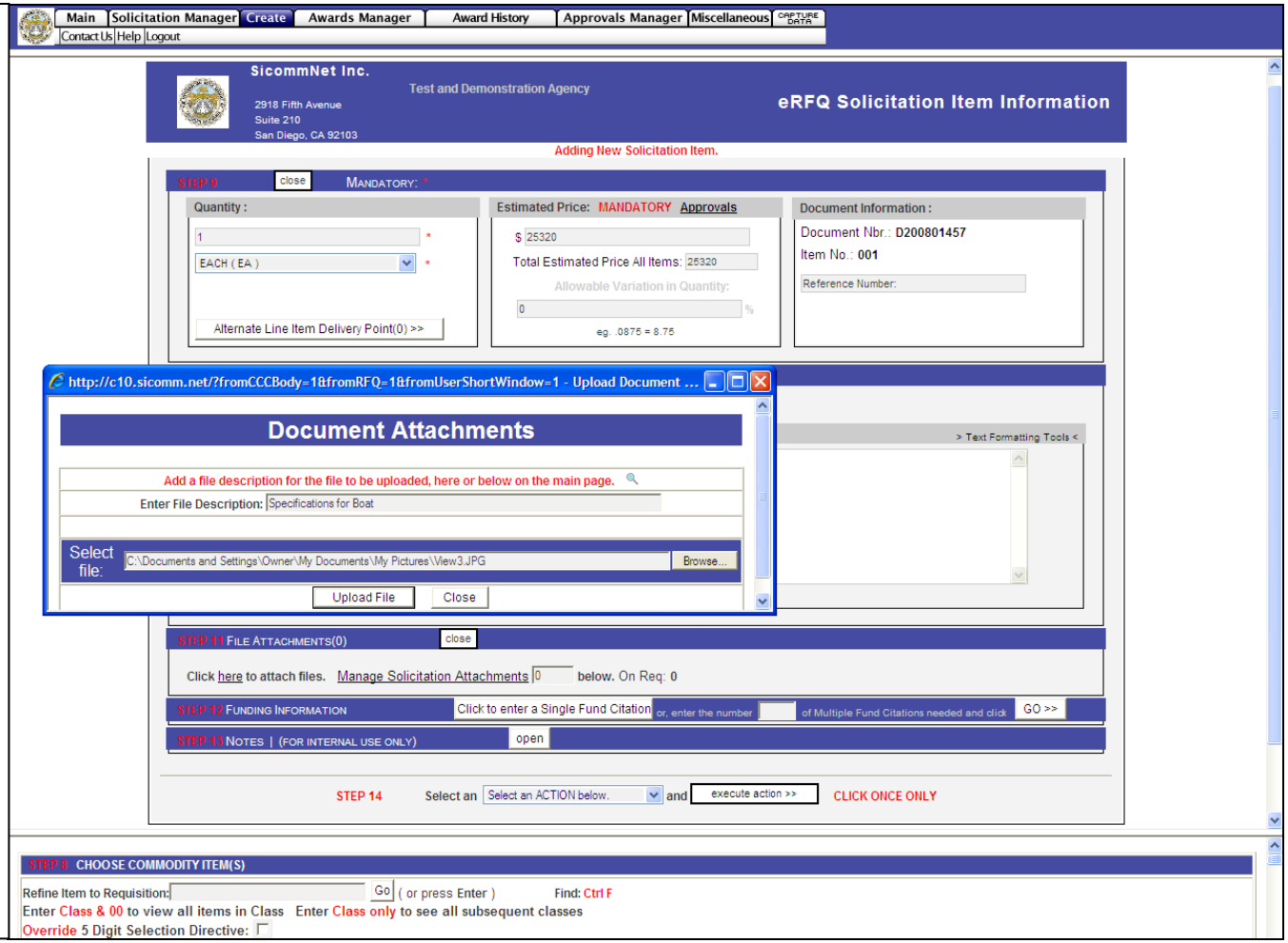
Click the **Upload** File button

The uploaded file will be indicated in the box and may be viewed or deleted by clicking on the **Manage Solicitation Attachments** link

Additional files may be attached by clicking the link again

Any type of file may be uploaded except executable files (exe)

Any size file may be uploaded by the buyer but large files exceeding 4MBs are not recommended as vendors may have difficulty viewing and downloading them – large files may be broken up into smaller files if necessary



Step 12 - Optionally, you may add Account Coding/Fund Citations to the solicitation

Click **Open Single Fund Citation** button to open this area

Enter coding - Coding may be saved for future use and will be displayed in a drop down list called **Valid Cost** Accounts

To enter more than one line of coding, start by entering the number of lines needed and then click **GO** – for example; the number 4 will produce 4 lines of coding information

Multiple lines of coding allows funds to be split by percentage, estimated dollars, or quantity

Step 13 – Optional internal notes may be added

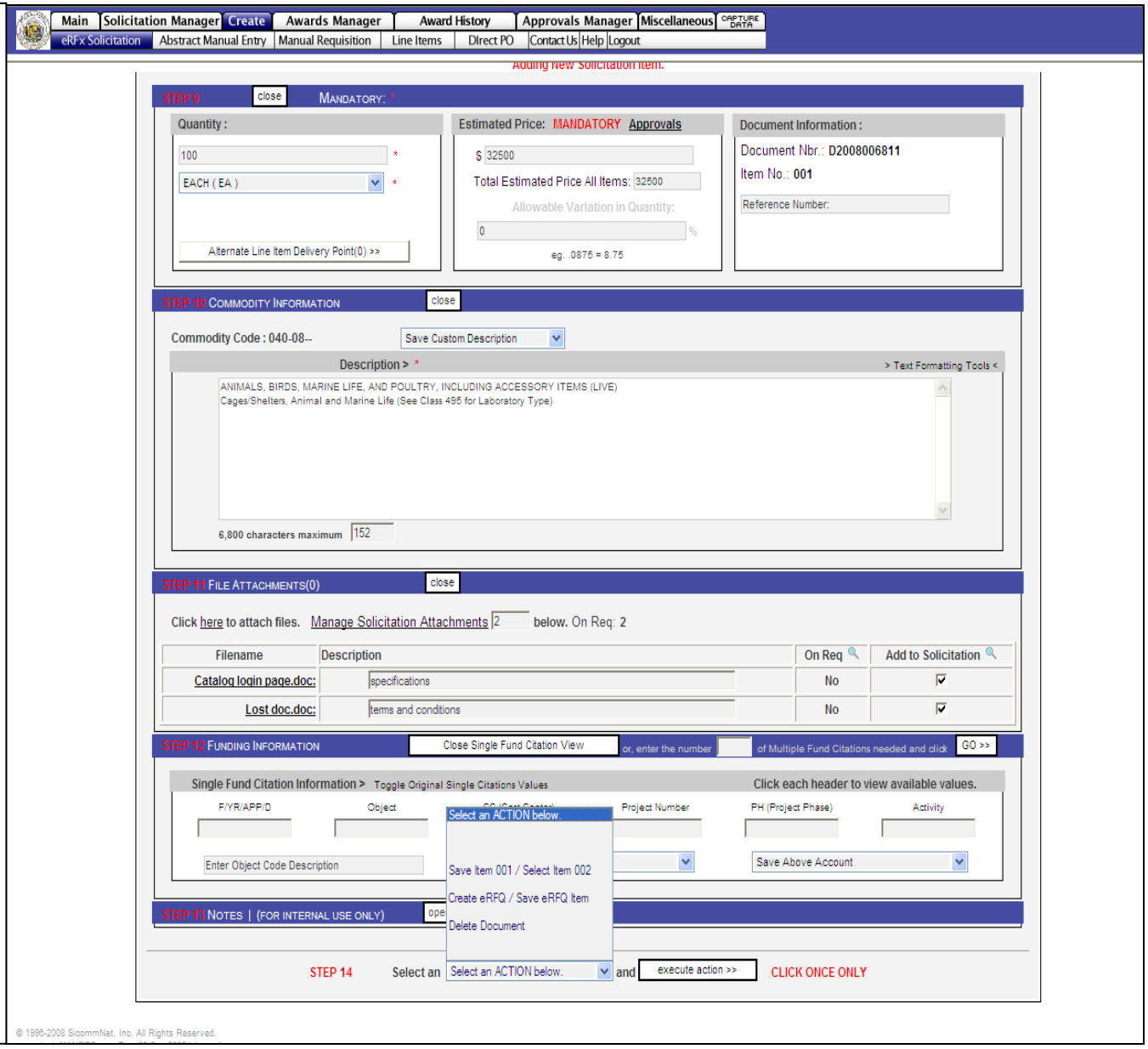
Step 14 – Select an Action by choosing from the drop down:

Save Item 001/Select Item 002 - back to Step 8 to add another item

Create eRFQ/Save eRFQ Item – continues the solicitation creation process

Delete Document – erases everything

Click **Execute** to continue



In Steps 1–14 you have created all the elements found in a basic requisition

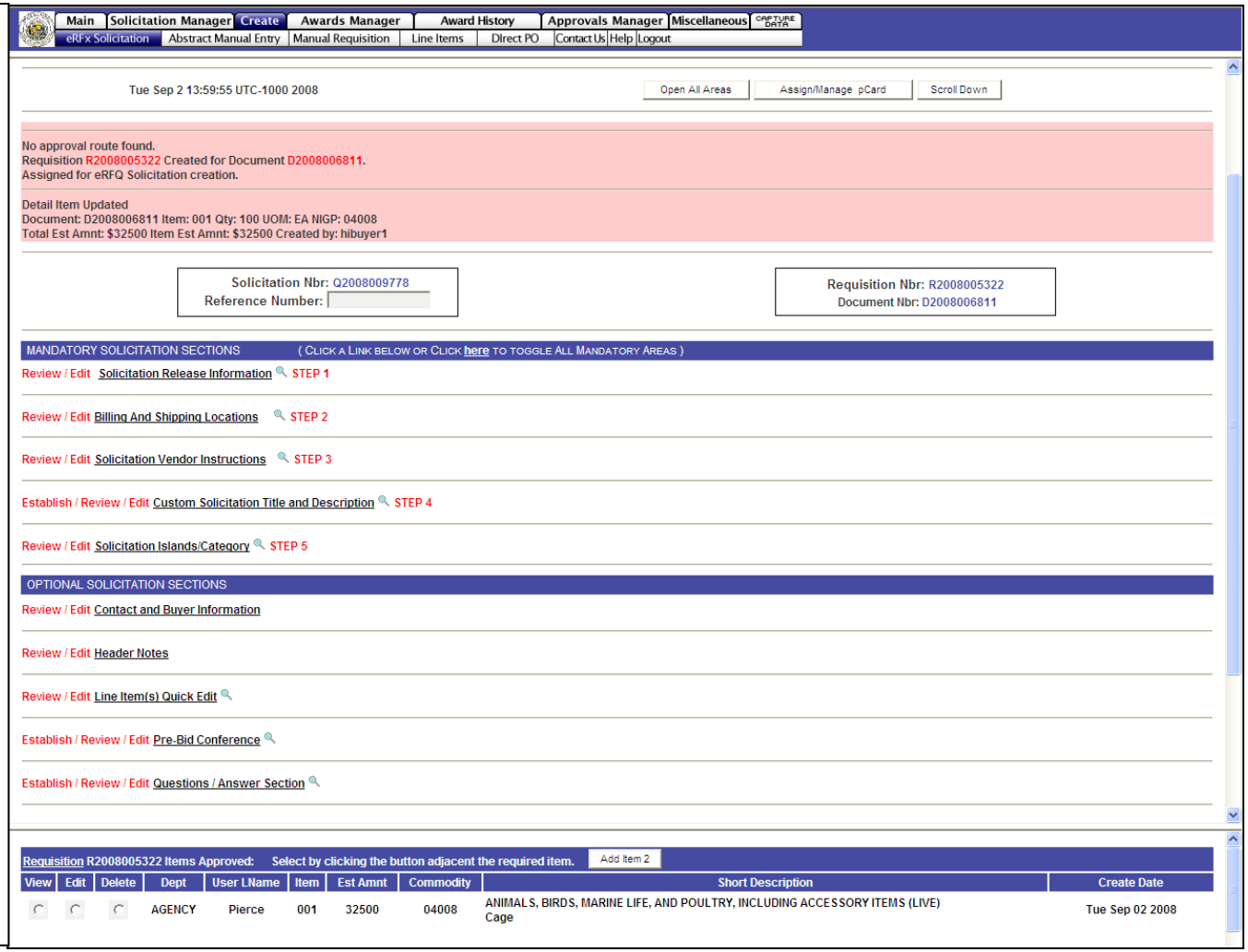
In order to turn this information into a Solicitation there are 5 more mandatory steps (numbered as **Steps 1-5** on this page) and a few optional ones

You may also review and edit all information entered so far

This page uses collapsed functionality meaning that in order to review and edit the information you must click on the underlined links to open that area – clicking on the link again will close the area – clicking on the button called **Open All Areas** in the upper right will open all areas of review at once

To review and edit the information on the line item click on the **Edit** button in the bottom frame – this will covered a few pages later

Steps 1-5 are detailed on the next page



Mandatory Step 1

Item Response - if the solicitation has multiple line items you can set the system to require vendors to respond to all line item (**all or none**) or allow for **individual response** using the drop down selection

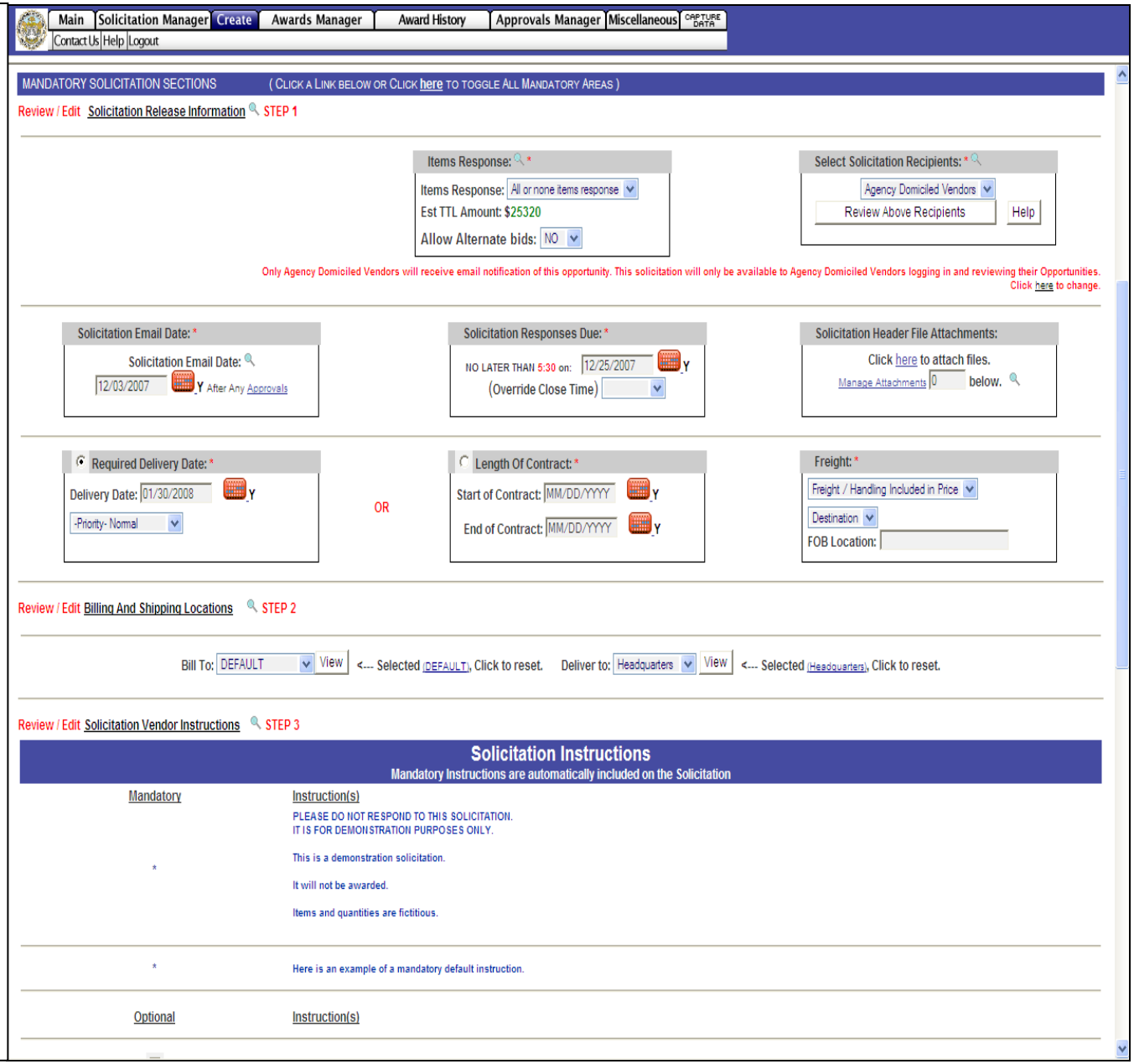
Select Solicitation Recipients - vendors may be selected using either **Agency Domiciled Vendors** (meaning Hawaii only) or **All Registered Vendors** (entire system including the mainland and foreign countries) – selected vendors may be viewed by clicking on the **Review Above Recipients** button – there is an option to add additional registered vendors to this list

Solicitation Email Date - optionally, the solicitation may be kept on hold until the date entered for its release – the default is today's date

Solicitation Responses Due - Enter a due date and time (closing date) – system default is 4:30 PM HST

Solicitation Header File Attachments - optionally header files may be added – these are not the same as the line item files you may have added earlier

Review **Required Delivery Date** or **Length of Contract** and **Freight** info – edit if necessary



Mandatory Step 2

Review and edit if necessary the **Bill To** and **Deliver To** information that was selected earlier

Mandatory Step 3

Choose Solicitation Instructions – there are a number of **mandatory** instructions for vendors that will automatically appear on your solicitation (transaction fee, tax requirements, upload and download instructions, etc.)

In addition there may be a number of **optiona**l pre-built instructions that you may choose to add to the solicitation by clicking on the square box on the left side of the instruction

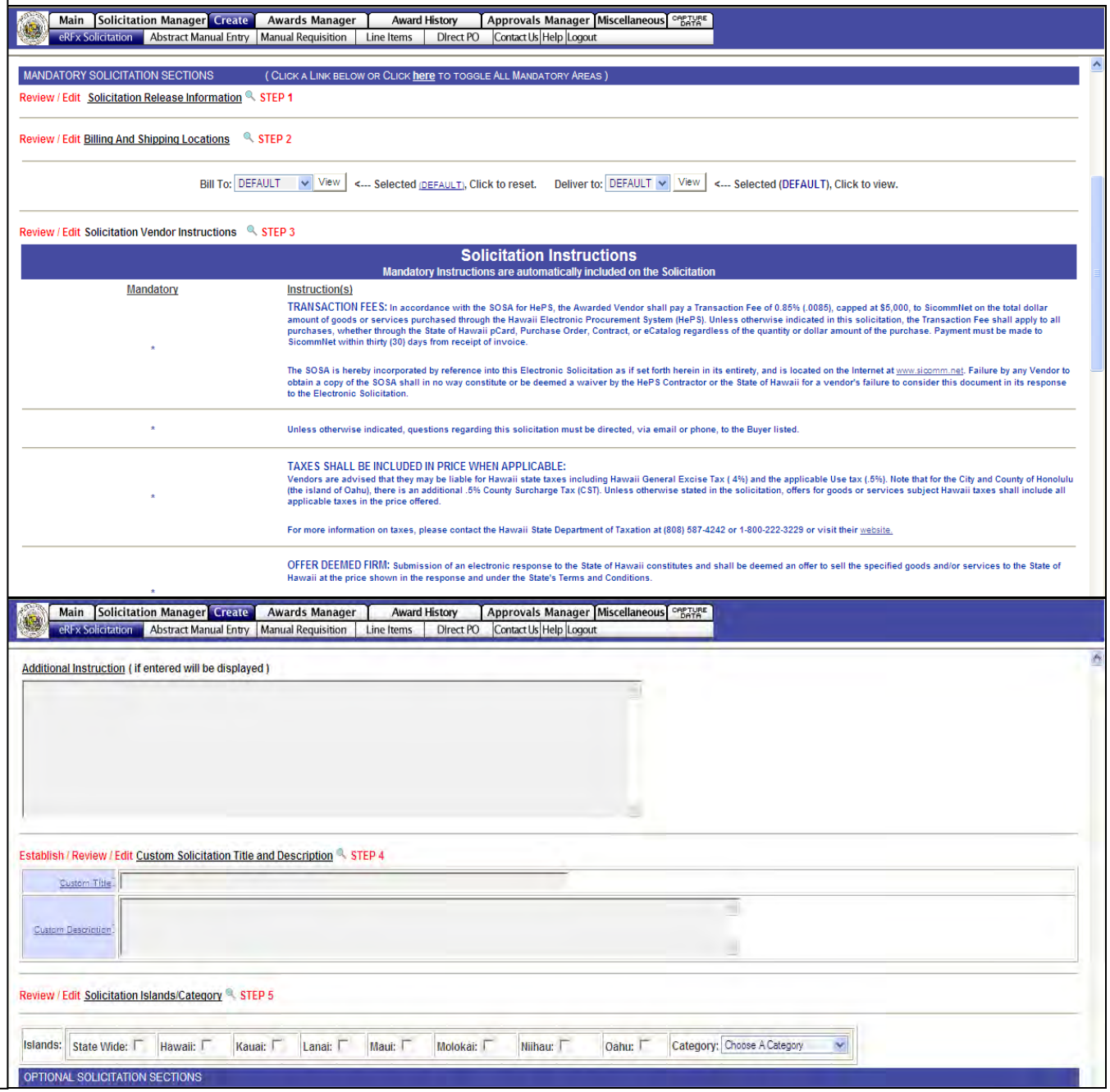
There is also a box for you to enter in **additional instructions** or information that you may need – please contact your system administrator if you would like to have additional mandatory or optional instructions added to the list for future use

Mandatory Step 4

Enter a title for the solicitation – only the title is mandatory, the title description is optional

Mandatory Step 5

Check the island(s) where the goods or services are to be delivered. Chose a category from the dropdown selection.



Optional Solicitation Sections
The following areas are all optional features that may be used in creating your solicitation:

Contact and Buyer Information – review and edit as necessary

Header Notes – review and edit as necessary

Line Item Quick Edit – allows you to change quantities, unit of measure, and estimated dollar amount, but not description

Optional Solicitation Tile and Description – may be added

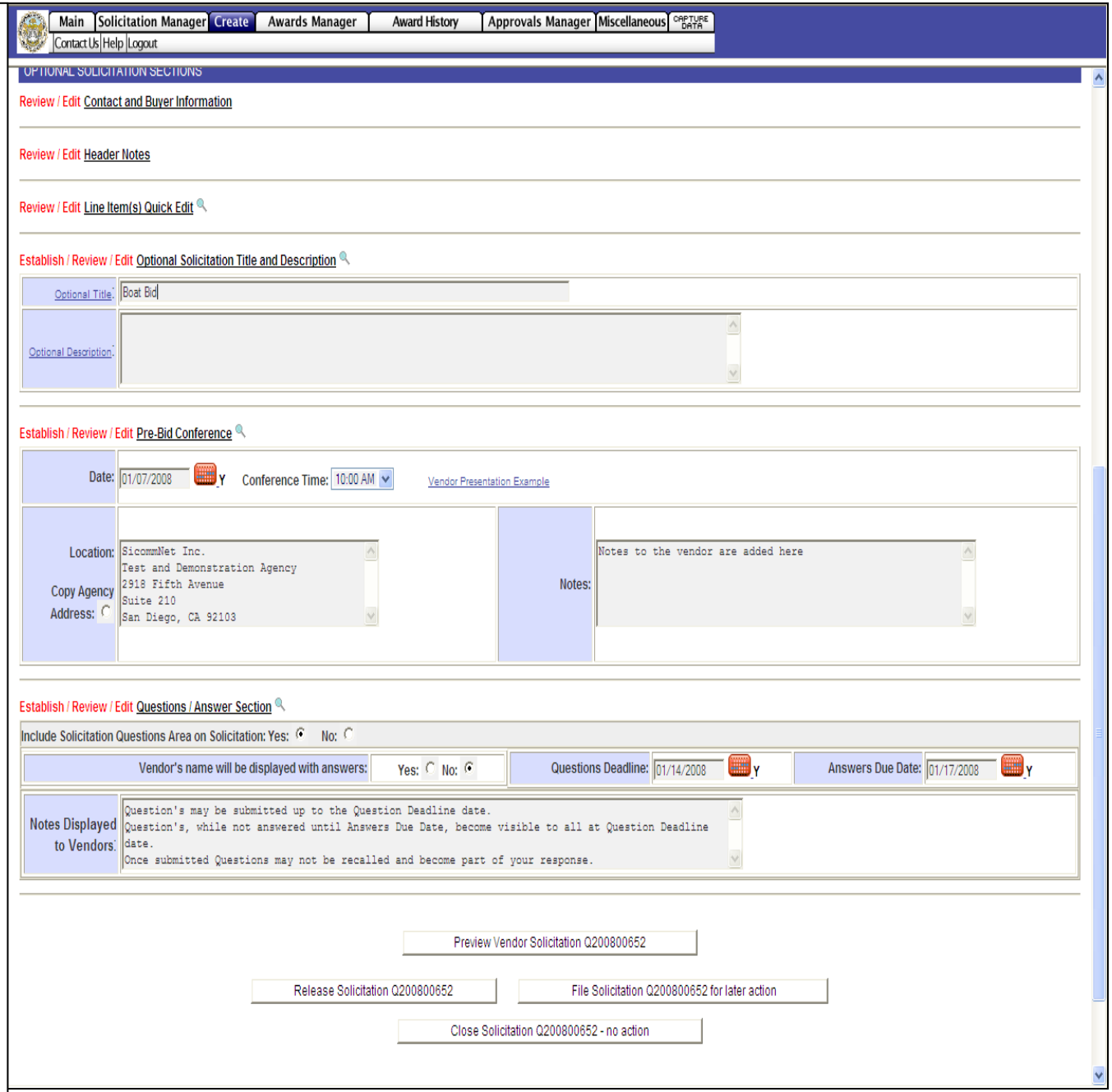
Pre-Bid Conference – used for notifying vendors of a pre-bid conference or pre-site visit requirements – choose a date, time, place, and add notes

Questions/Answer Section – allows for vendors to submit questions online – choose to show the vendors name, a deadline for question submittal, and a time at which your answers will be published to all vendors

Prior to completion the line item may be reviewed and edited also – see the next page for information or to complete the solicitation choose:

Release Solicitation - sends it to approval routing or to the internet

File Solicitation for later action – will save and place it in Solicitation Manager/On Hold for future edits



Line Item Edit

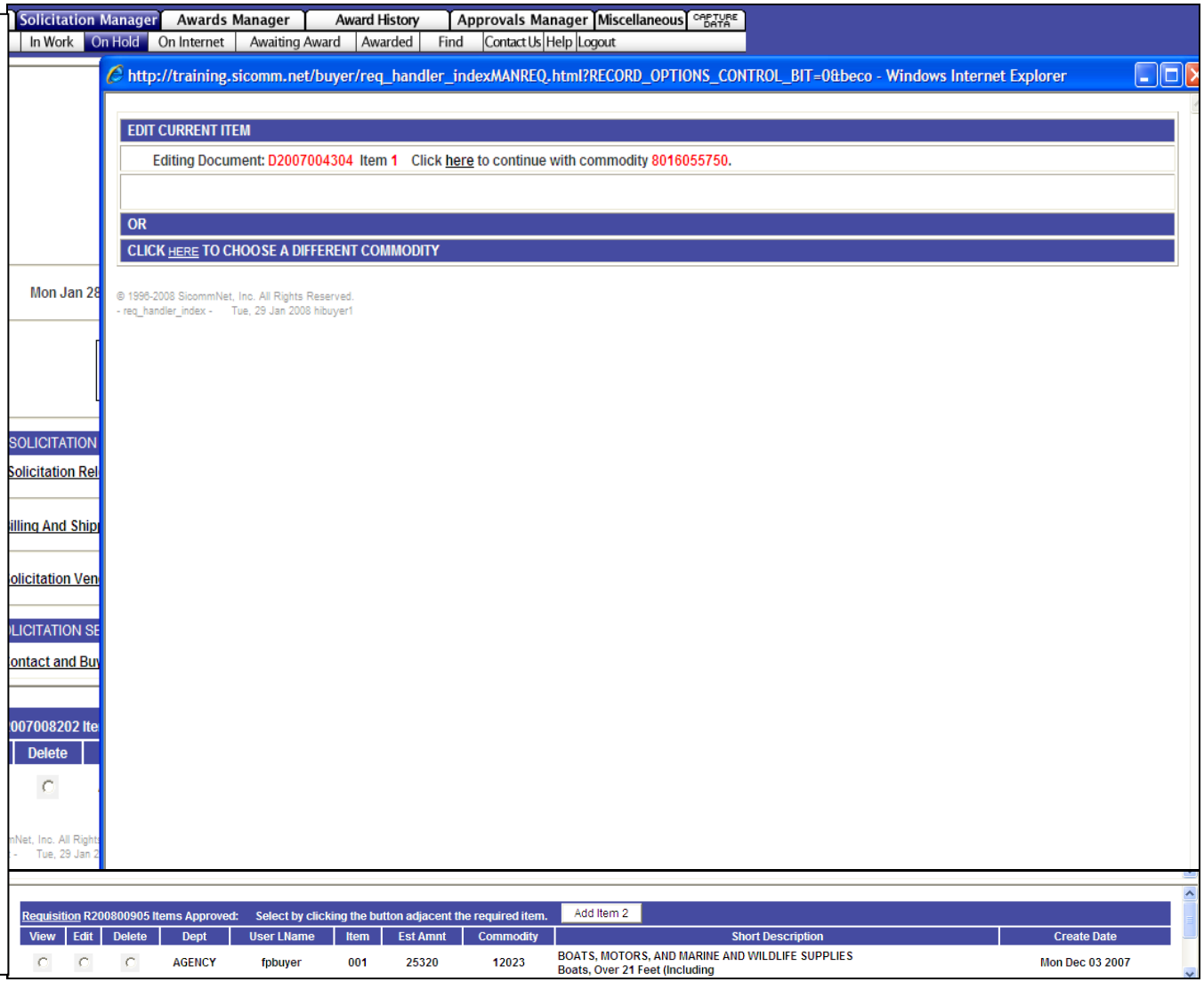
Prior to release of the solicitation the line items(s) may be reviewed and edit if necessary – the options include changing the quantity, unit of measure, editing the description, editing attachments, changing the commodity code, and adding additional line items

Click on the **Edit** button in the bottom frame in the line item area. The process is the same as Steps 9-14.

Editing the Existing Line Item – click on the Click **here** to continue with commodity number which will open a different window with the same Steps 9-14

Choose a Different Commodity – Click **here** to choose a different commodity - allows you to select a new commodity code to replace the existing one – the process is the same as in Steps 8-14

Adding Another Line Item – Click on the Add Item 2 button in the center of the bottom frame – the process is the same as Steps 8-14



When all reviews and edits are done, click the **Release RFQ** button in the upper frame.

The solicitation will be checked for approval routing.

The solicitation will be displayed on the **On Internet** page. The pink area will contain information about whether the solicitation has been released to the internet or has been sent to approval touting.

If in approval routing, you will get an email confirmation that the solicitation has been released when the last approver has approved it.

The **On Internet** page displays in formation about the solicitation including; number of responses, list of vendors emailed, questions and answers, pre-bid conference. It is where amendments are done (**Amend**) and when a solicitation can be cancelled (**Remove**). It has a link to the actual view that a vendor sees (**Vendor View**).

Part 2 – Amending a Solicitation and Managing your Solicitation

This section covers how to amend a solicitation that is on the internet. It allows for every aspect of the solicitation to be reviewed and edited as necessary. Vendors are notified by email of all amendments and the system tracks all changes.

To begin, click on the **On Internet** Icon

Amending a Solicitation

All parts of a solicitation may be reviewed, edited, or amended as necessary – in addition this page contains this information:

Click on the **small round button** next the number of responses to view names of vendors who have responded – prices are not displayed

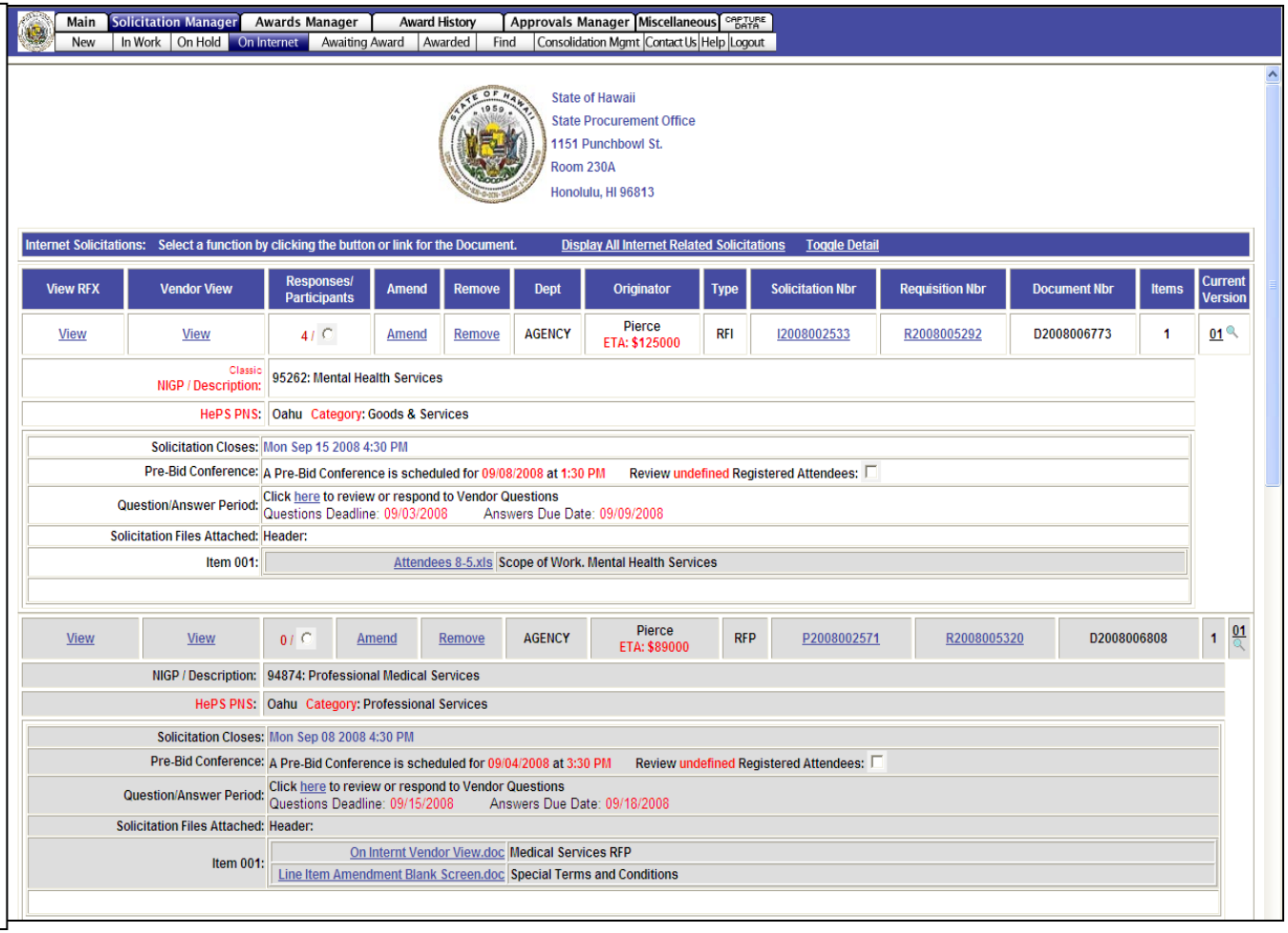
Pre-Bid Conference – vendors may optionally signup to attend. Click on the **check box** to view attendees

Question/Answer Period – Click **here** to view and respond to vendor questions

Vendors – if Agency Domiciled Vendor option was chosen, click on **here** to review that list

Solicitation Files – click on the link to view your attachments

To begin amending a solicitation, click on the word **Amend** which is a link.



Mandatory Step 1

Before anything can be changed on the page you must first enter in a reason for the amendment by typing in your reason in the **REASON TEXT** box. This information is included on email notifications to the vendor regarding your amendment.

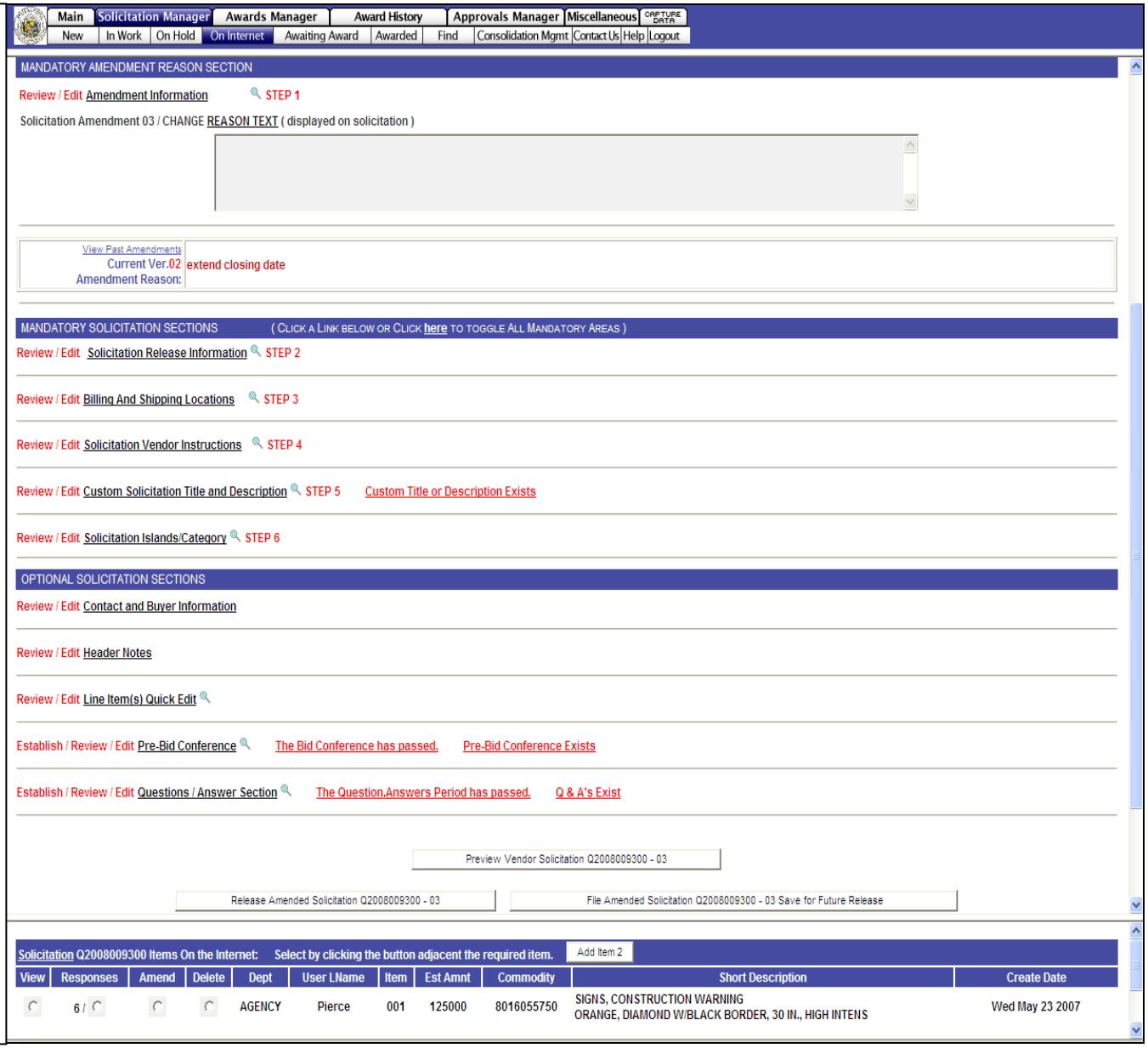
Mandatory Steps 2-6 may be reviewed and edited. Click on the text links to open those areas.

Optional Solicitation Sections may be opened by clicking on the text links.

To amend information on the line item (quantity, unit of measure, description, attachments, commodity code) click on the **Amend** button in the lower frame. The process is the same as when you were editing the original solicitation described earlier on Page 13.

To add another line item, click on the **Add Item 2** button in the center of the page in the lower frame. The process is the same as described earlier in Steps 8-14.

To finish and release the amendment, click on the **Release Amended Solicitation** button or you may choose to save your changes and **File Amended Solicitation for Future Release**.

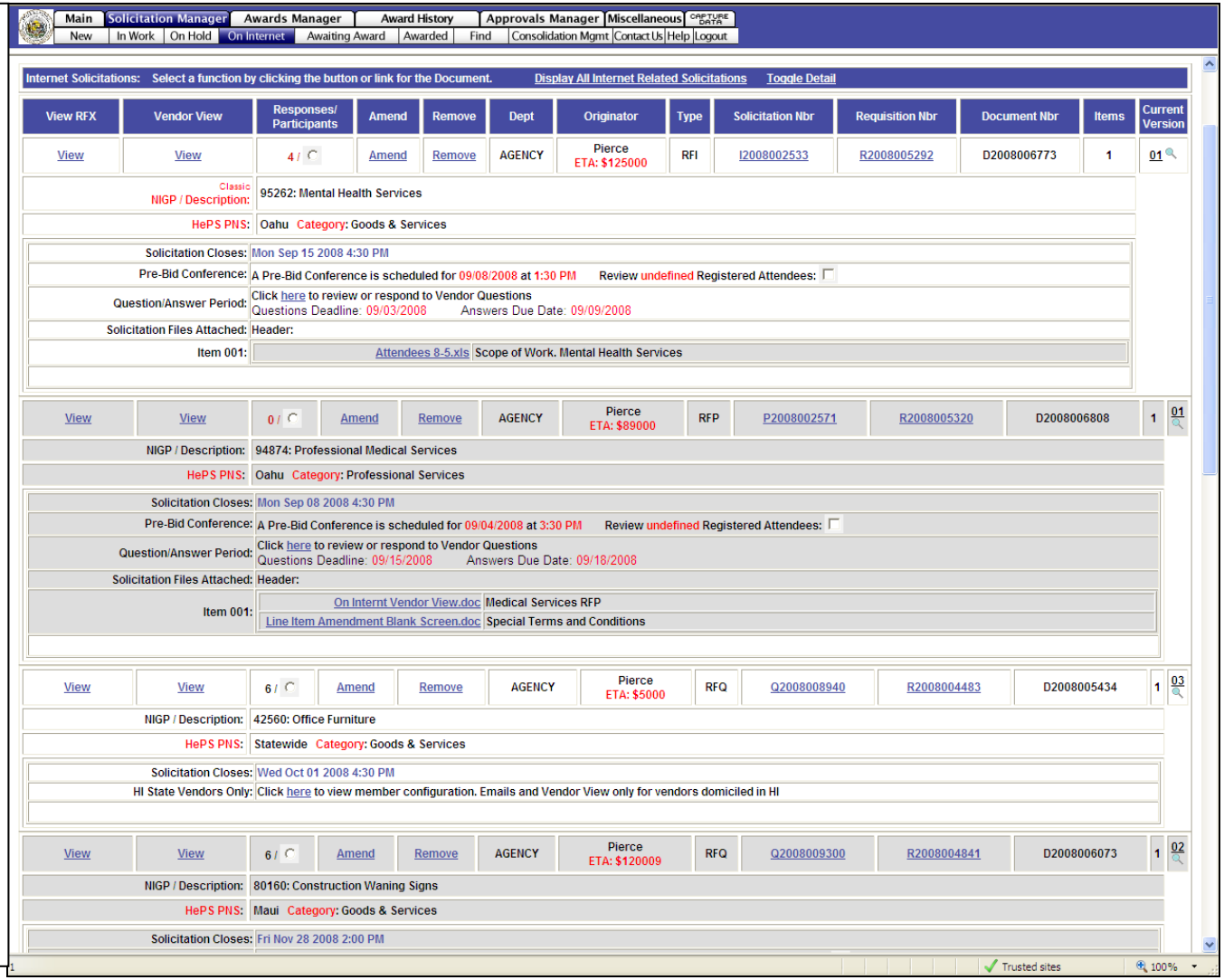


The amended solicitation may be checked for approval routing just like the original release depending upon your internal setup.

If approval routing is found, you will receive an email notification when it is approved and released.

It will again be displayed on the **On Internet** page.

Notice that the **Current Version** has changed to **01.** The small magnifying glass icon opens a display of the previous version reasons.



Solicitations can be set to close at anytime during the day. However, the system will batch the responses at night and make the results available the next morning. An email reminder that the solicitation has closed will be sent.

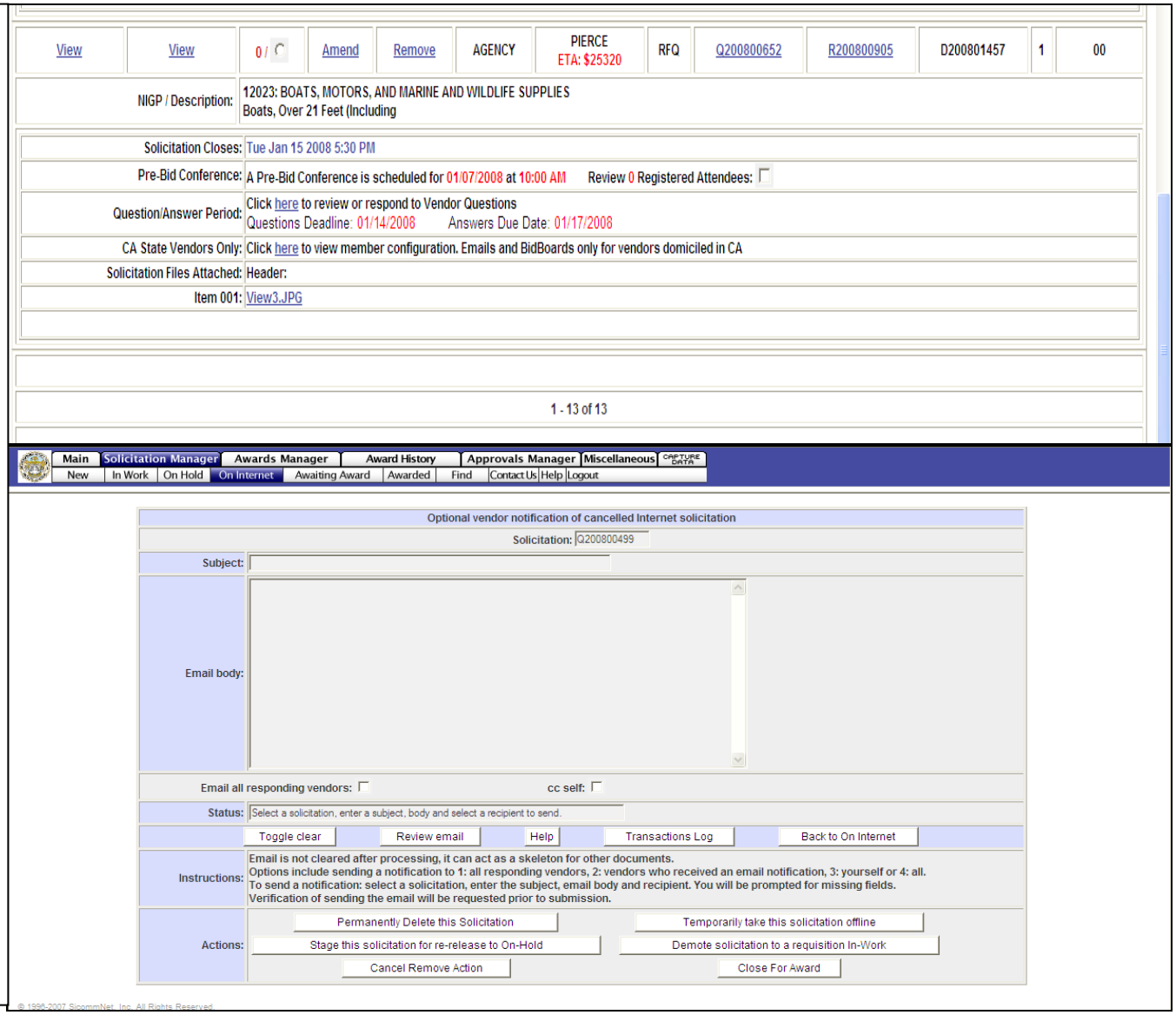
Optionally, you may manually close the solicitation and show the results at anytime after the closing date and time without waiting for the overnight batch processing.

From the **On Internet** page click on the word **Remove**.

In the upper frame, click on the **Close for Award** button on the bottom left below the optional email to vendors.

Popup confirmations will appear. The solicitation will be moved to the **Awards Manager** area where you can open and view the responses in the normal fashion.

Note: The **Remove** function is also where you can cancel the solicitation, move it to on hold status, temporarily remove it, or demote it back to a requisition. It has an optional email to vendors that can be used to notify them of your actions.



Part 3 - Creating an Award

This section covers how to view vendor responses, select a vendor for award, and create the award notification.

To begin, click on the Create an Award Icon and choose RFQ from the popup

Closed solicitations appear as a list in the bottom frame.

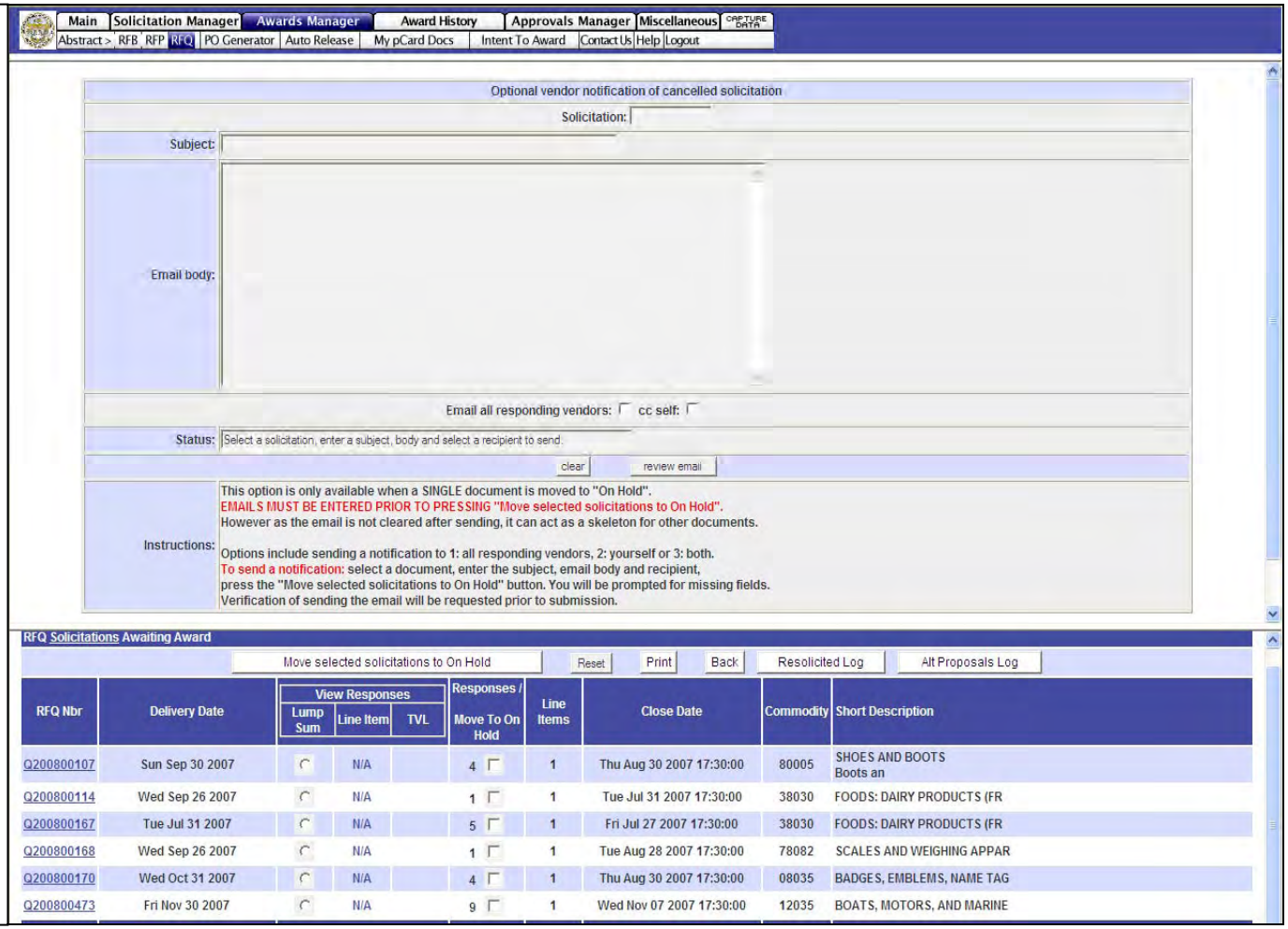
To open the solicitation and view the responses click on the **Lump Sum** button**. Line Item (Split Awards)** will be covered on page 25.

Optionally, you may choose to move the solicitation to **On Hold** where you can edit and re-release it or cancel it. This most commonly used when there are no vendor responses.

Click on the **square box** next to the number of responses and then on the **Move Selected Solicitations to On Hold** button.

The solicitation will be moved to **Solicitation Manager/On Hold** and any responses will be lost. An optional email is available to notify vendors of your actions.

Confirmation popup messages will appear with an explanation of the actions you are taking.



Vendor responses are displayed on the **Abstract** page in order from lowest to highest cost. Responses are separated by a dark blue line.

At the bottom of the page you can optionally click to create the abstract page as an **Excel file**.

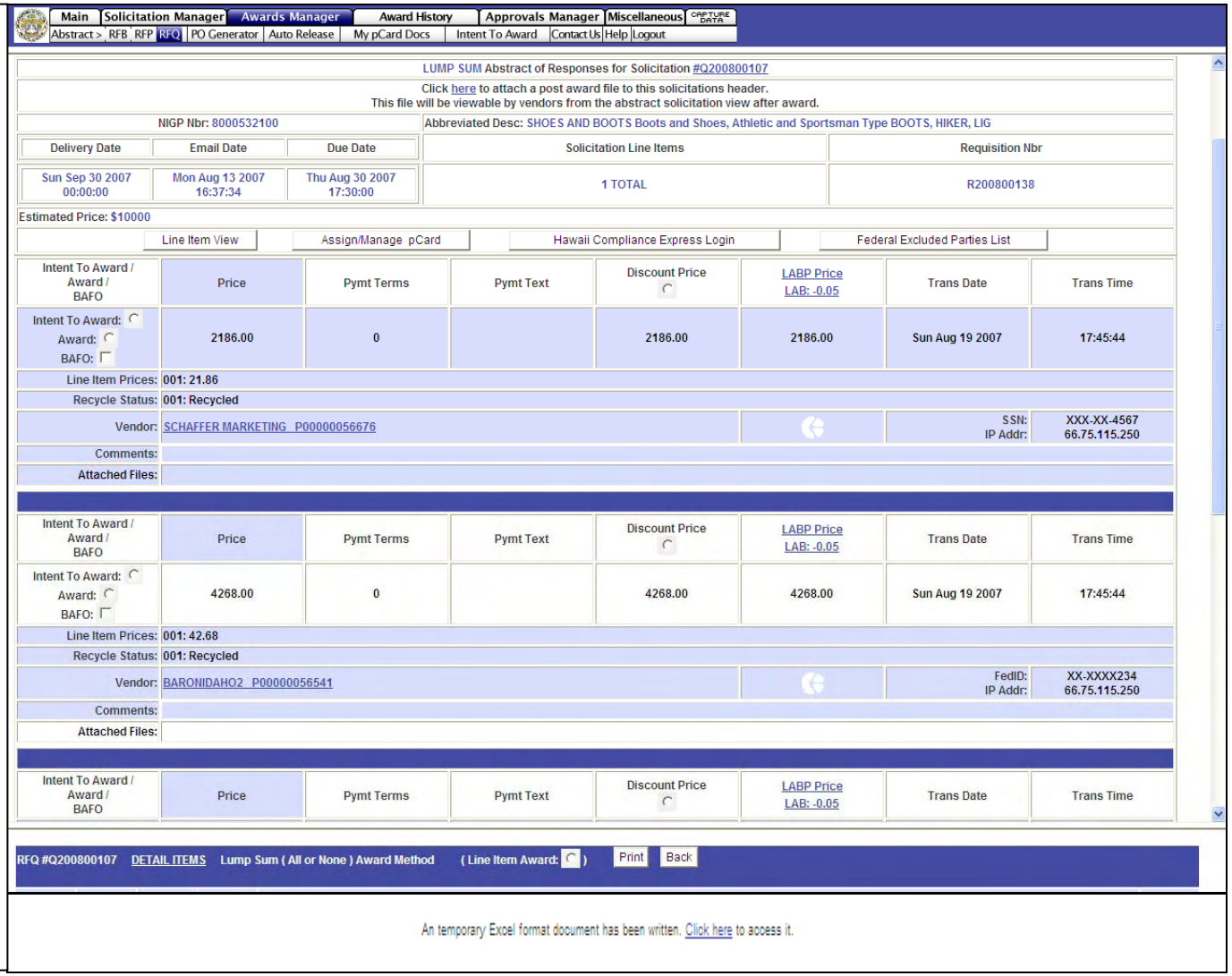
The page shows all relevant information about the vendor and their quotation and has links to **Hawaii Compliance Express** and **Federal Excluded Parties List** websites.

Intent to Award – opens an email system where you may send a notification of intent or ask for additional documents (Compliance documents). There is also an optional email that can be sent to the non-selected vendors.

Award – is where you choose the awarded vendor and create the award notification.

The vendor's name is a link to their profile information.

Vendor comments and file attachments will appear if a vendor submits that info.

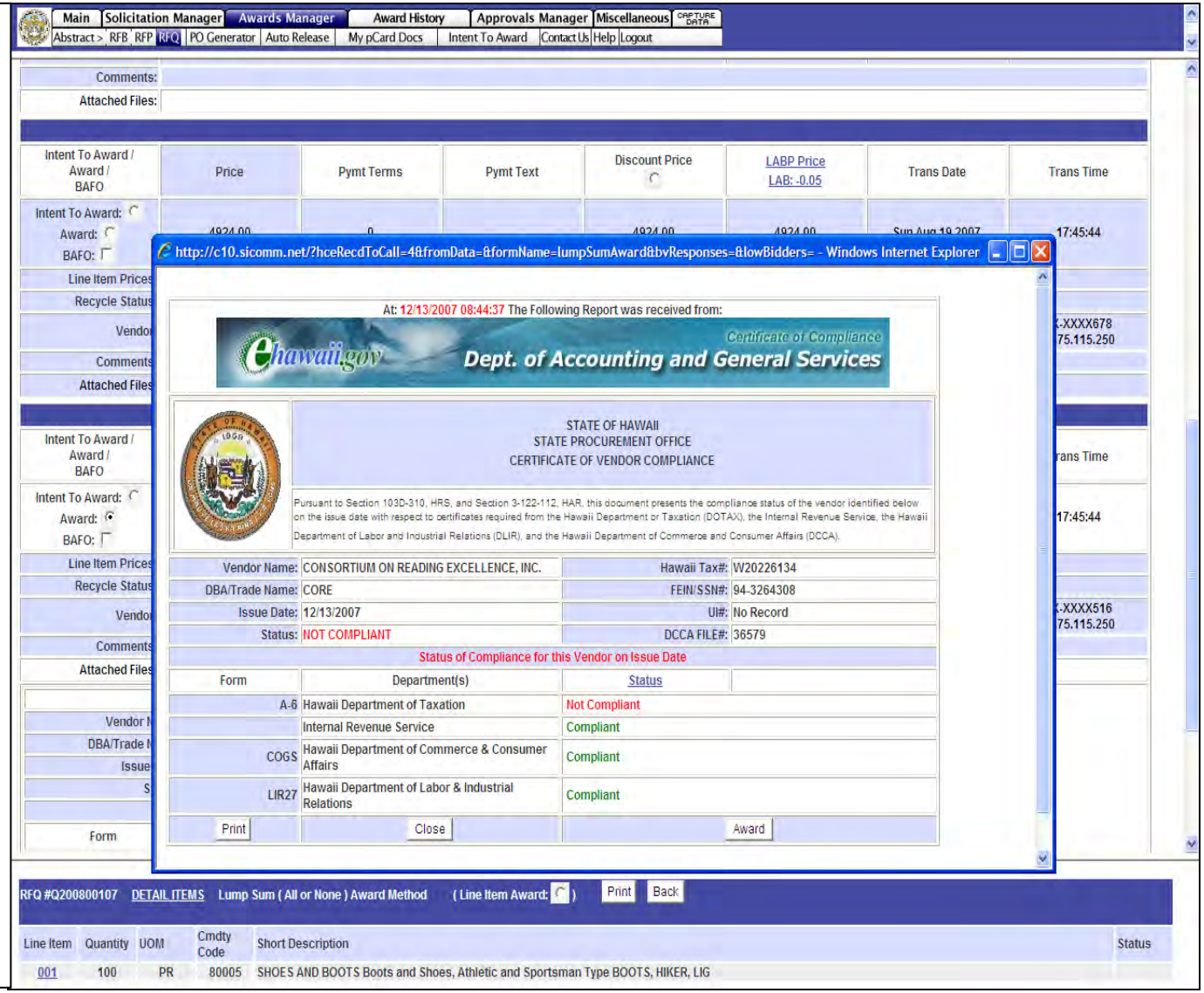


Hawaii Compliance Express

When you have selected your vendor and are ready to award, click on the **Award** button. HePS will automatically access the HCE system to check for vendor compliance and show you the results.

In this example, the vendor is compliant in 3 areas only and not the 4th area, so they are **not compliant**. If compliancy is not required for this award notification you may optionally continue the award process by clicking on the **Award** button.

You may also just **Close** this window and go back to the Abstract page view. The results of the HCE check are placed on the Abstract page directly below the vendor's response.



Hawaii Compliance Express – continued

This page shows the results when a vendor is not a part of the HCE system.

The vendor will be displayed as Not Complaint and you have options to continue with the award (**Create the Award**) or **Try Again Later**) or contact the vendor by using the **Create an Intent to Award** email system.

You may also **Close** this window and go back to the Abstract page view.

If the HCE system is unavailable a message will appear (not pictured).

Once a vendor has been selected by choosing the Award button, you will be taken to the **Award Input** page.

Mandatory Award Section -
Click the link to open this area and choose the **Award Type**, **Award Instructions**, **Basis of Award**, **Competition Type**, **Signed By**, and optionally you can **Assign/Manage pCard** and add **Competition Comments** that can be seen by approvers and auditors.

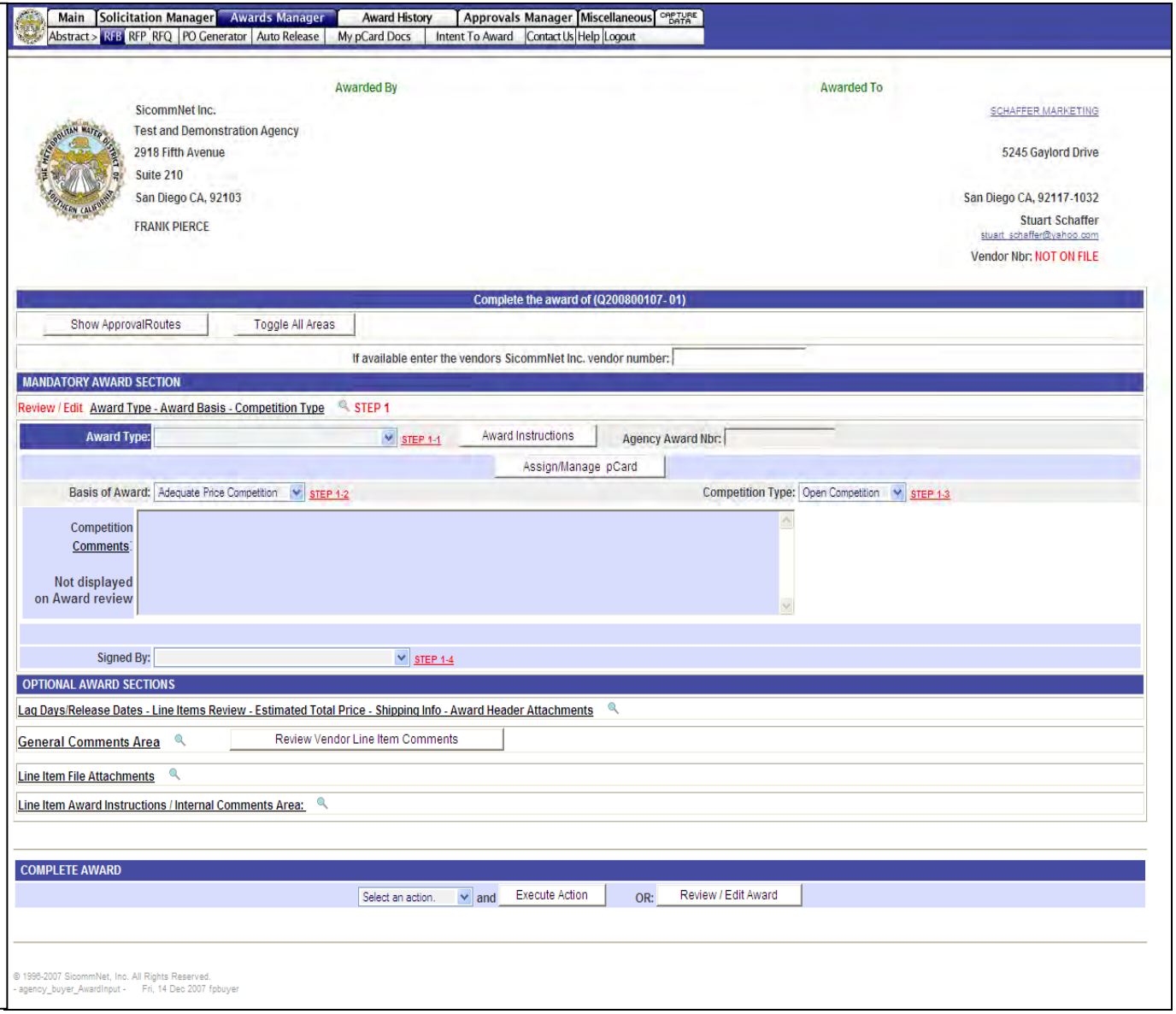
Optional Award Sections -
Click on the links to open these areas and enter optional information on the award.

Lag Days – set a future release date for this award

General Comments – add comments and attach vendor comments

Line Item Attachments – add or remove attachments

Line Item Award Instructions Internal Comments Area



The final step before releasing the Award Notification is to click on the **Review/Edit Award** button on the lower right of the page.

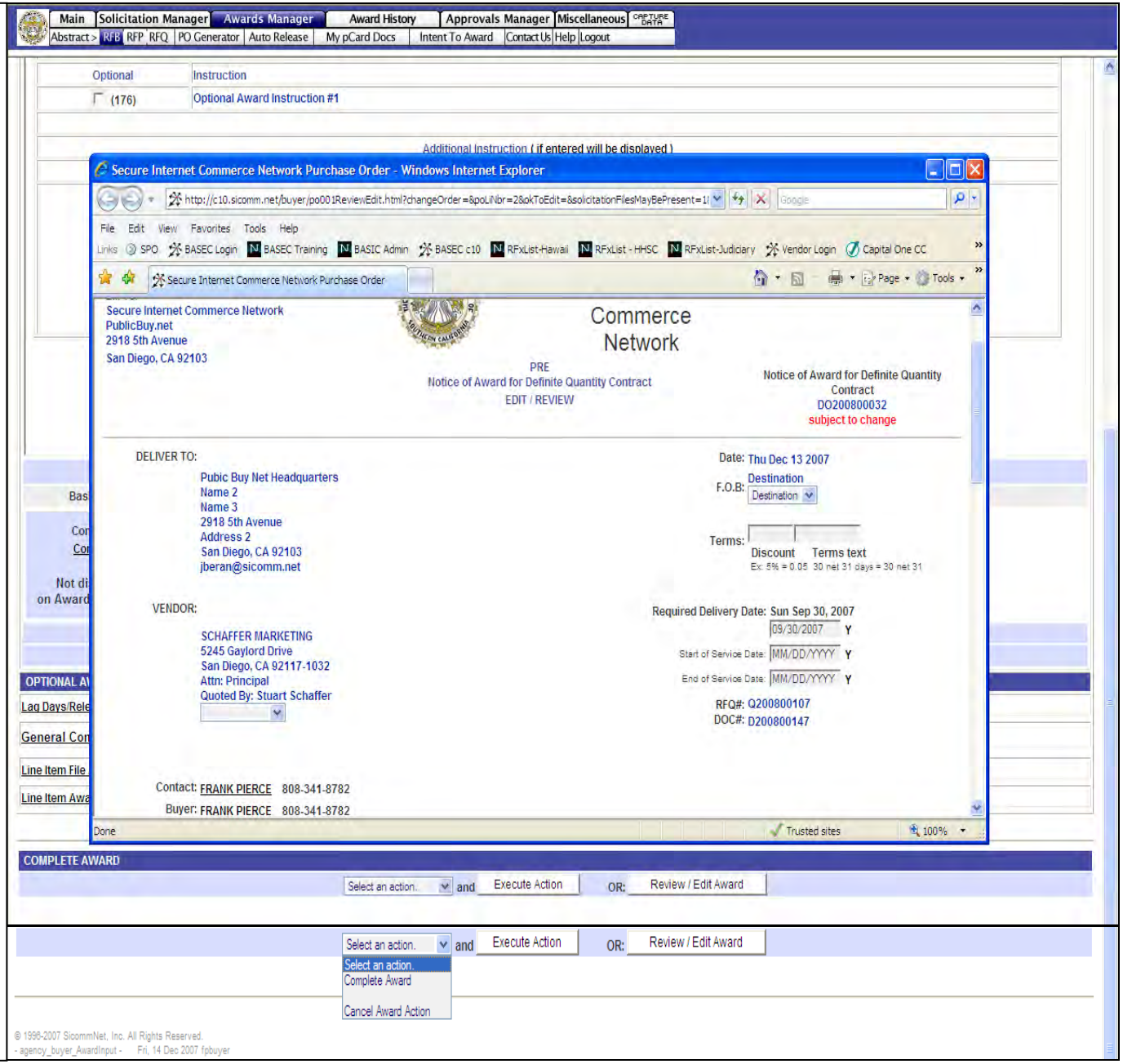
All parts of the award are available for review and editing as needed. Pay special attention to the **delivery** or **state/end of service** dates to be sure they are accurate.

Optionally you may add line items, delete line items, add comments, change descriptions and attachments, and adjust quantities and pricing if necessary to complete the award.

The bottom of the page has a link to open an optional email to notify vendors of any significant changes you made to the award.

Choose the **Close No Action** button is no changes were made or the **Save Changes** button on the bottom of the page.

You will be returned to the **Award Input** page for final release action. Click on **Select an Action**, choose **Complete Award** and click on **Execute Action**.

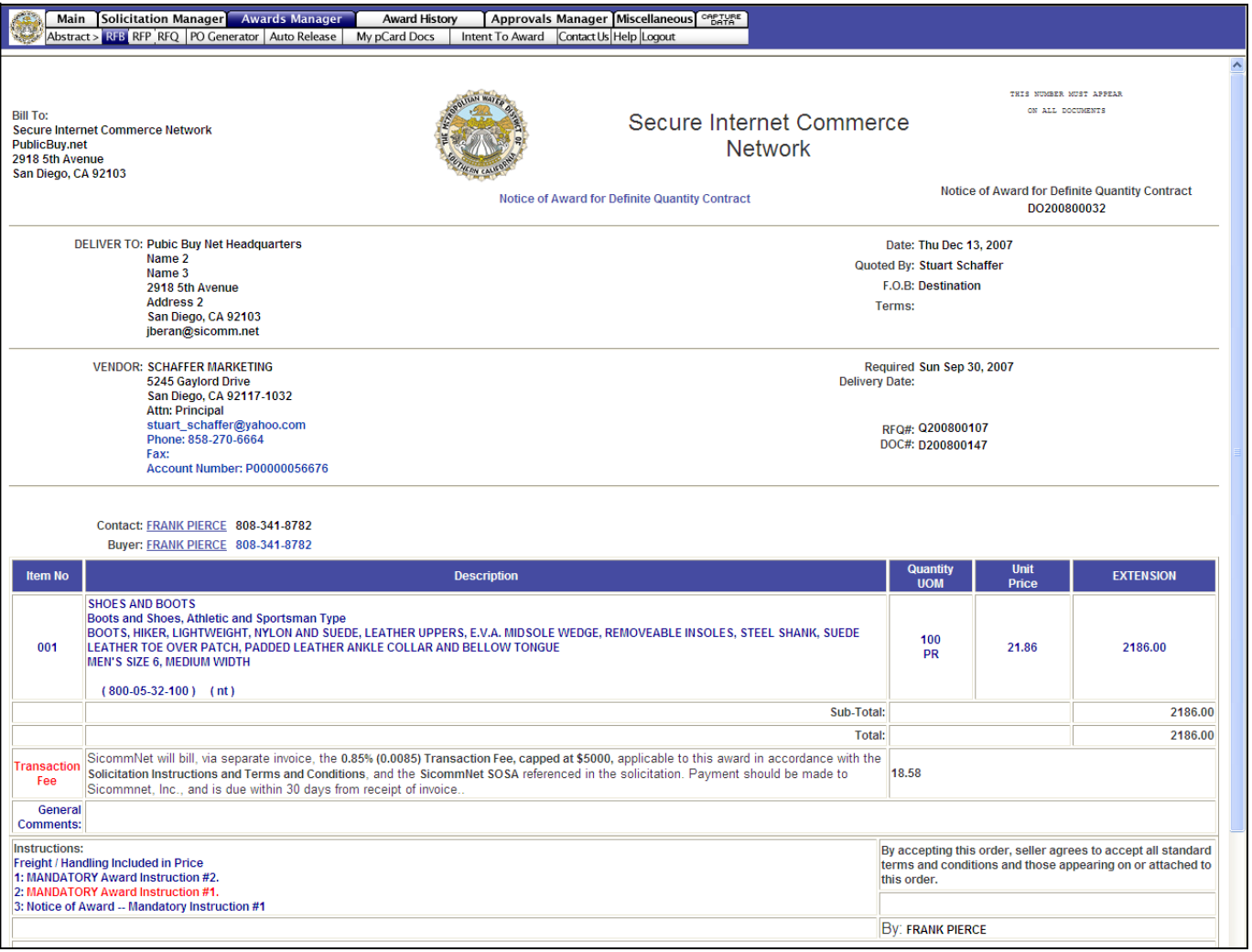


The completed **Award Notification** will be displayed. A popup will indicate if the award is being sent to approval routing or if it is being released to the vendor.

Actual email of the award to the vendor does not go out until the nightly batch process. The award can be edited at anytime before the batch is processed.

The bottom of the page has a **Print Button** if you wish to have a hard copy of the award.

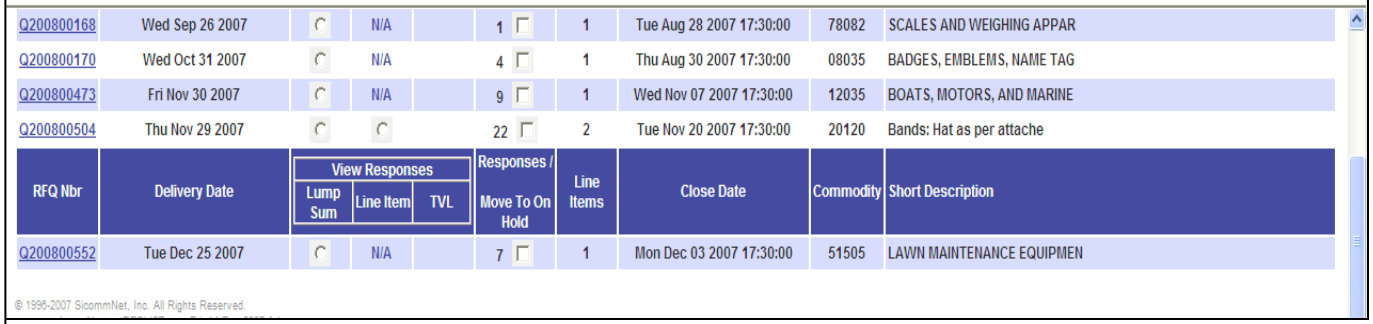
The award can be found again in **Award History**.



To create awards by **Line Item (Split Awards)** go to the **Awards Manager/RFQ** page as before and select **Line Item** instead of **Lump Sum**.

The line items will be displayed in the bottom frame. You can select which item to work on. It will be marked as **In Work** and the Abstract will display the prices for that line item only.

There are two options for awarding by line item. 1) You can select a vendor for a line item and complete that award, then do another, or 2) you may select the vendors for all the line items first and then create the awards.



RFQ Nbr	Delivery Date	View Responses: Lump Sum	View Responses: Line Item	View Responses: TVL	Responses / Move To On Hold	Line Items	Close Date	Commodity	Short Description
Q200800168	Wed Sep 26 2007		N/A		1	1	Tue Aug 28 2007 17:30:00	78082	SCALES AND WEIGHING APPAR
Q200800170	Wed Oct 31 2007		N/A		4	1	Thu Aug 30 2007 17:30:00	08035	BADGES, EMBLEMS, NAME TAG
Q200800473	Fri Nov 30 2007		N/A		9	1	Wed Nov 07 2007 17:30:00	12035	BOATS, MOTORS, AND MARINE
Q200800504	Thu Nov 29 2007				22	2	Tue Nov 20 2007 17:30:00	20120	Bands: Hat as per attache
Q200800552	Tue Dec 25 2007		N/A		7	1	Mon Dec 03 2007 17:30:00	51505	LAWN MAINTENANCE EQUIPMEN

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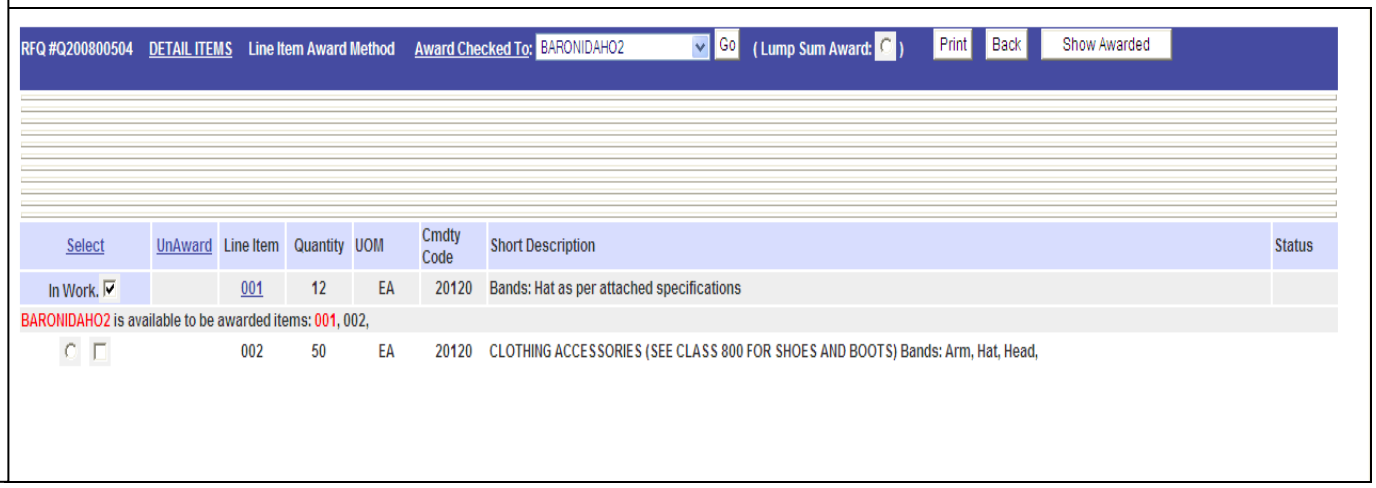


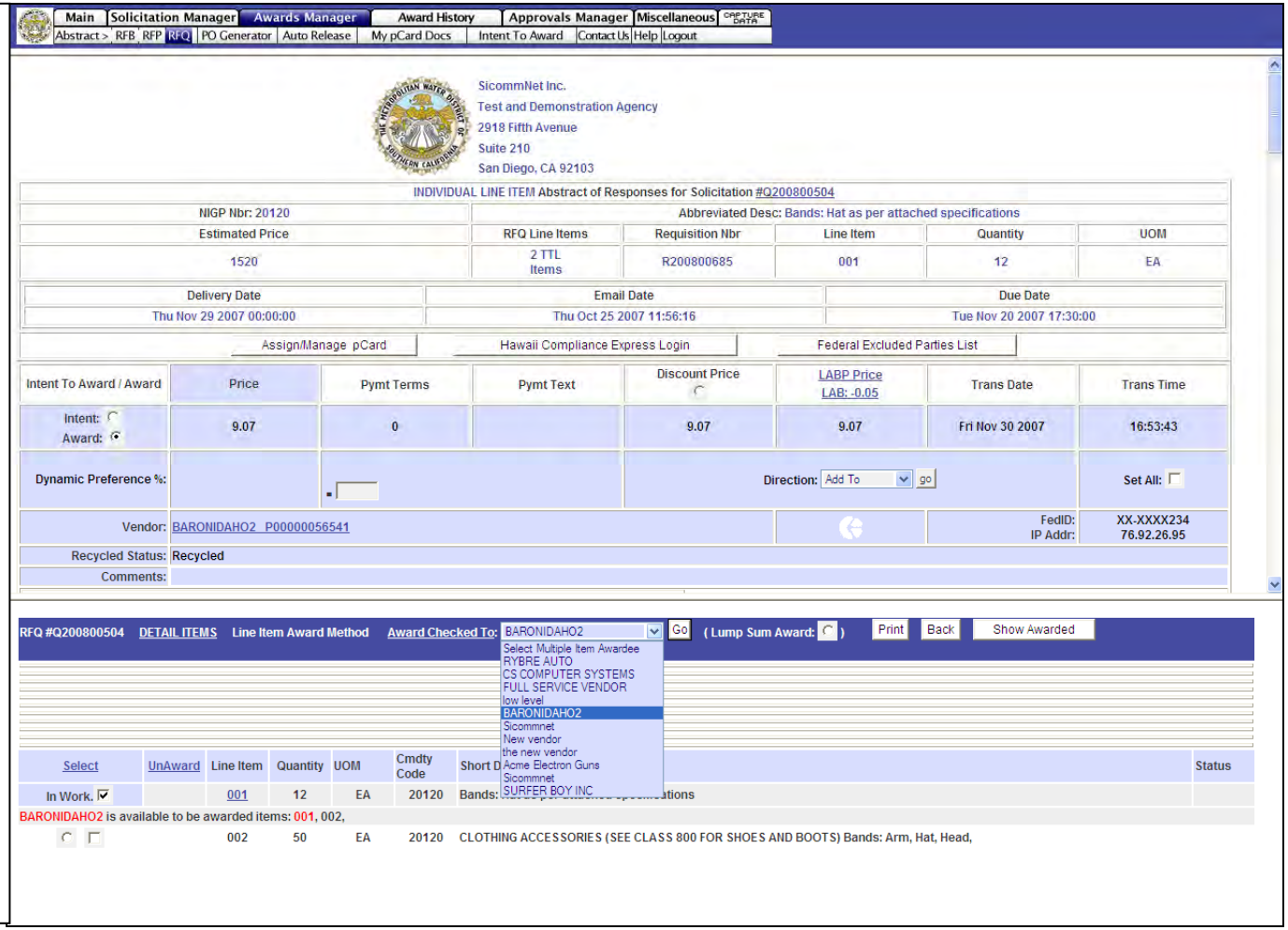
RFQ #Q200800504 DETAIL ITEMS Line Item Award Method Award Checked To: BARONIDAHO2 Go (Lump Sum Award:) Print Back Show Awarded

Select	UnAward	Line Item	Quantity	UOM	Cmdty Code	Short Description	Status
In Work.		001	12	EA	20120	Bands: Hat as per attached specifications	
BARONIDAHO2 is available to be awarded items: 001, 002,							
		002	50	EA	20120	CLOTHING ACCESSORIES (SEE CLASS 800 FOR SHOES AND BOOTS) Bands: Arm, Hat, Head,	

After reviewing the abstract information, check the box next to **In Work**.

Then select the awarded vendor from the drop down list in the center of the bottom frame, **Award Checked To**:

This will assign the first line item to the vendor you have chosen. They system will also check the HCE for compliance.

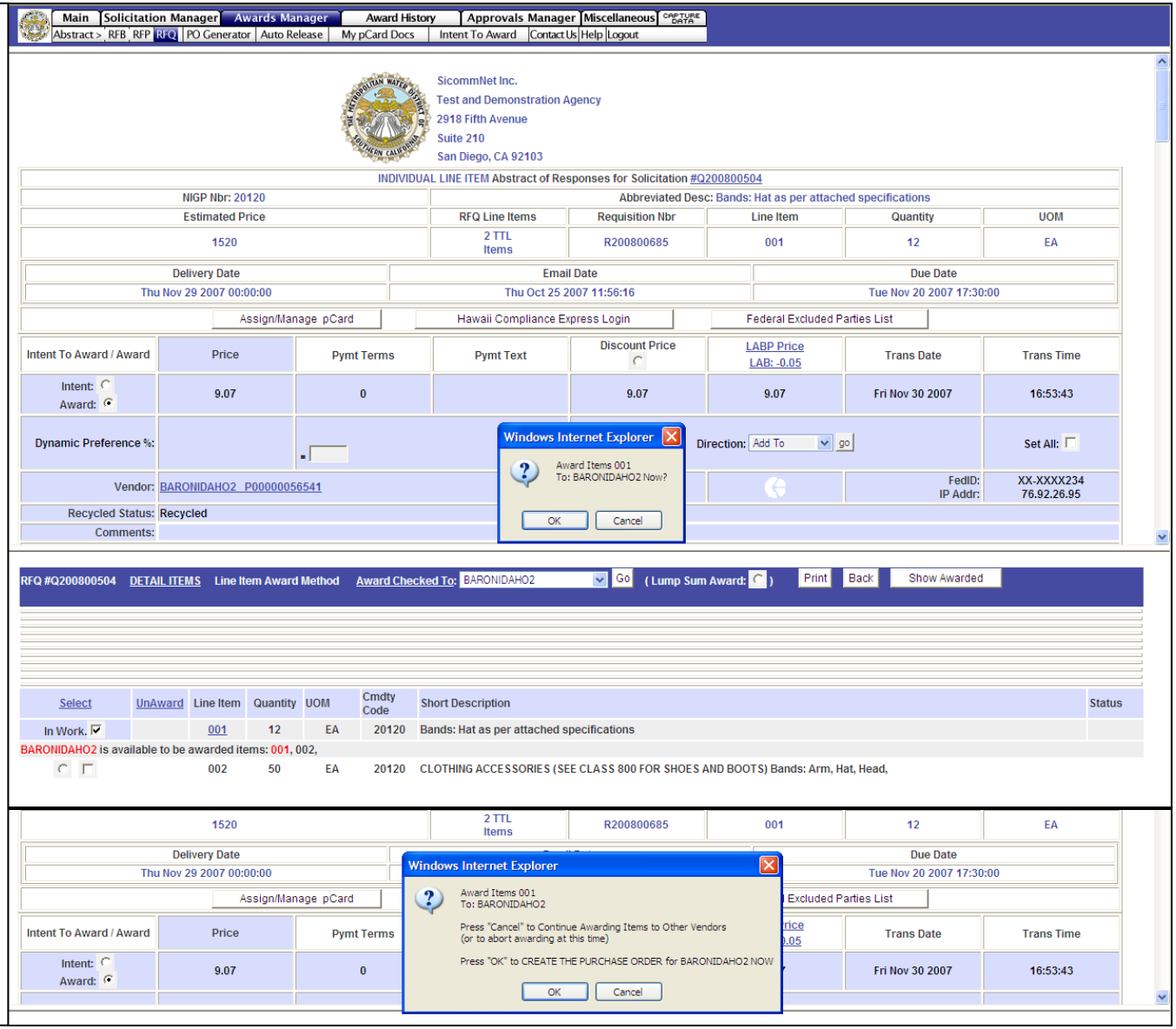


Confirm your choice of this vendor selection in the popup.

You will then be asked if you wish to award this line item now (**OK**) or continue selecting vendors for the other line items (**Cancel**).

Normally it is best to continue to select all the vendors for each line item first, then do the awards later. If you choose to do the award for one line item only, the other line items will remain in the abstract waiting for you to process.

Your first line item will be marked as **Awarded** and you can select the second line item (**In Work**) and choose a vendor from the drop down exactly as before.

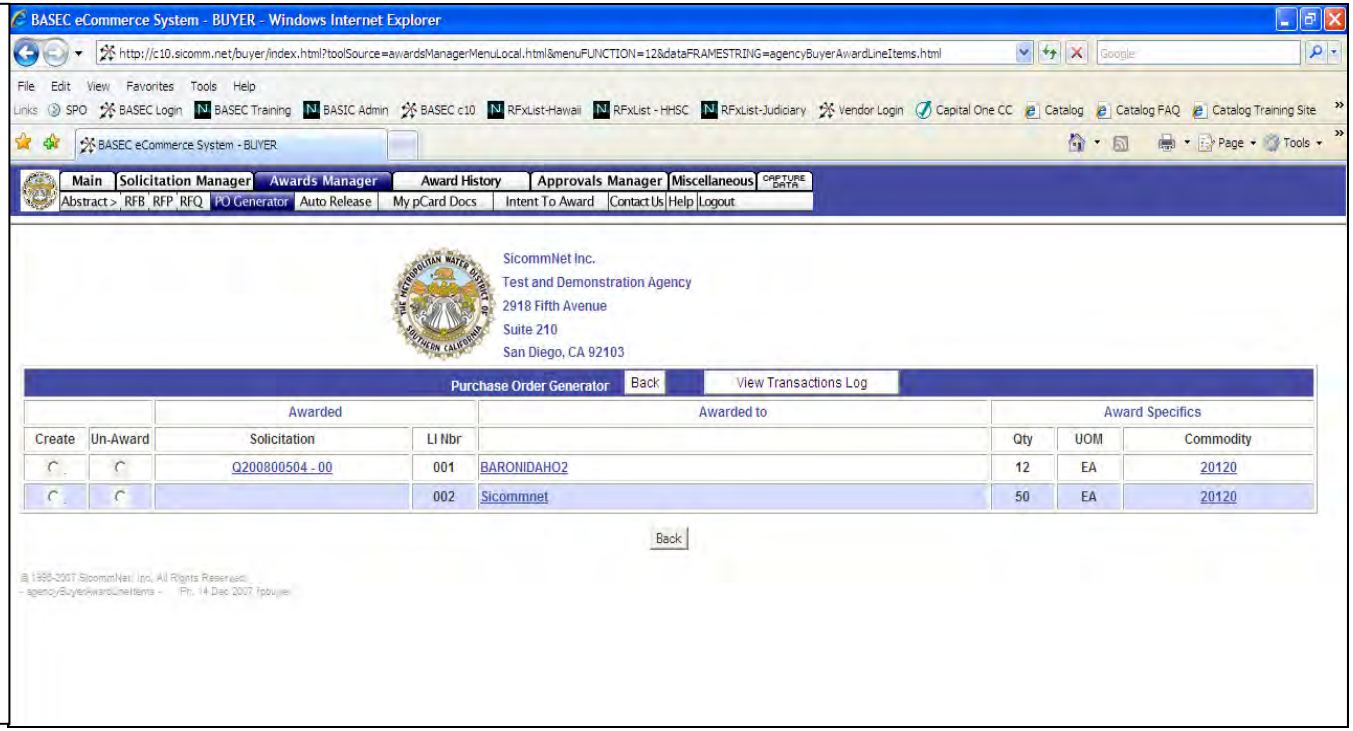


When all line items have been reviewed and a vendor selected for award on each of them, go to the **PO Generator** sub tab on the menu bar.

You selections will be displayed in a list. Choose to either **Create** or **Un-Award**.

Create will take you to the Awards Input page where you process the award in the normal fashion described earlier.

Un-Award will cancel your vendor selection and move the line item back to the abstracts page.



Part 4 – Finding and Managing Awards

This section will describe how to find your awards and manage them, including editing or cancelling an award, multiple awards, cancel and re-stage for award to another vendor, change orders, copying and reusing the RFQ used for the award, and printing of the PO Summary Report.

You can access your awards by using the **Award History** tab, then selecting **Search Awards** on the left side of the menu bar, or **All RFQs** on the right side.

. Or begin by clicking on the **Award History** Icon and choosing **Search Awards** from the popup

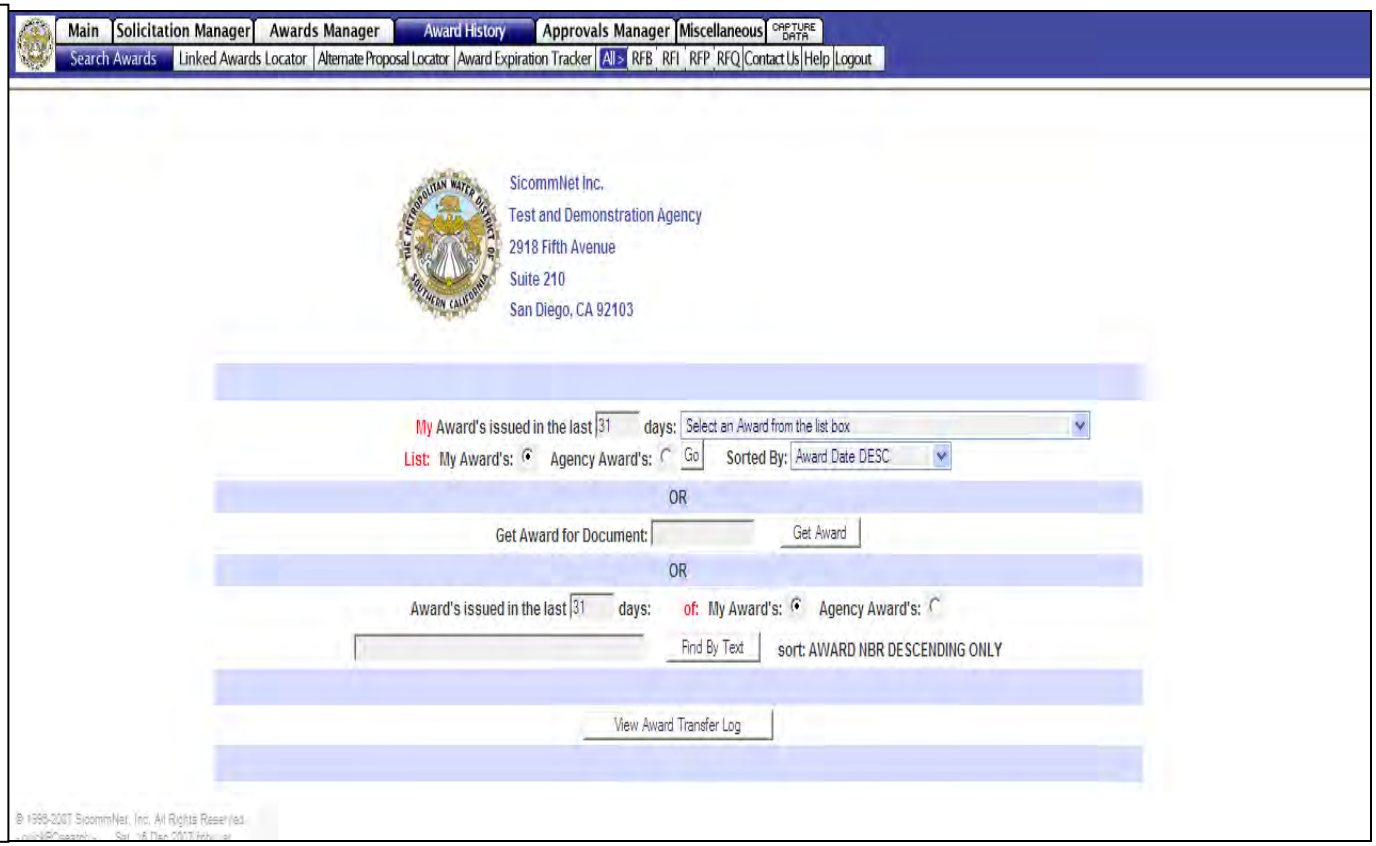
There are 3 ways to search for awards on this page.

First – By days. The default is 31 days but can be changed up to 9999. If you change the number of days, select **GO** and allow time for the sorting. The choose from the drop down **Select an Award from the List Box**

Second – By number. You can enter the award number in the **Get Award for Document** area.

Third – By text search. Enter in words that appear in the line item description on the award you are searching for and click on **Find by Text.** A list of awards will display

Note: You can search your awards only or those of the whole agency.



Your award or the award of others if you had chosen to show awards from others will be displayed.

Scroll to the bottom to access other functionalities.

Scroll to the bottom and us the Select an Action drop down to view all available functions

The primary areas you will access are:

Create a New Solicitation – will copy the original RFQ so you can use it again

Create Change Order – Change Order, Contract Modification, Amendment, or Extension

Print Document

Email Document to Below – enter in any valid email address in the space provided

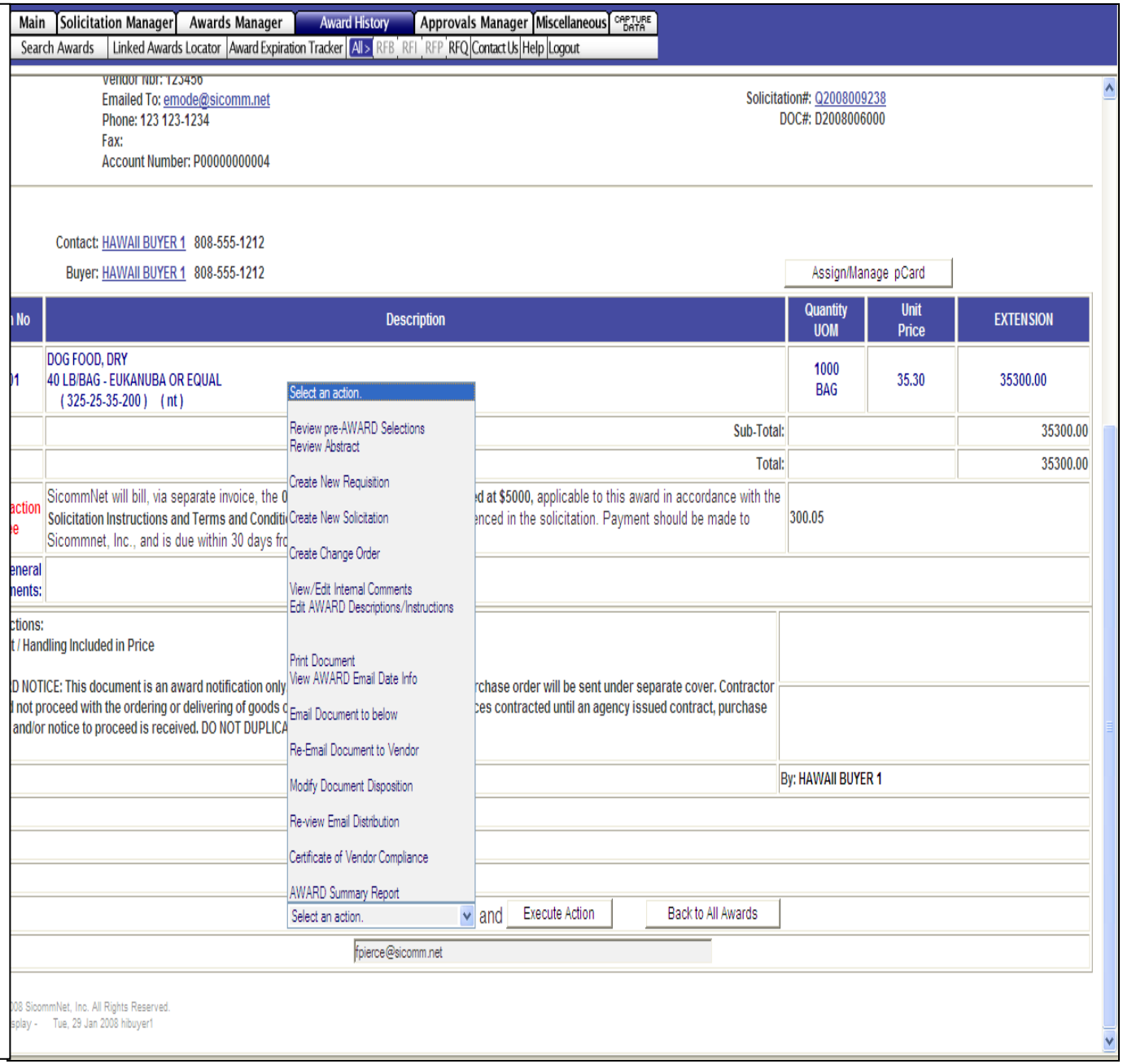
Re-email Document to Vendor

Modify Document Description – cancel the award, create a multiple award, re-stage for award to another vendor

Certificate of Vendor Compliance – view and print a copy of HCE compliance certificates

AWARD Summary Report – a full history of the procurement from first creation to final award, has all the details needed for approvers and auditors

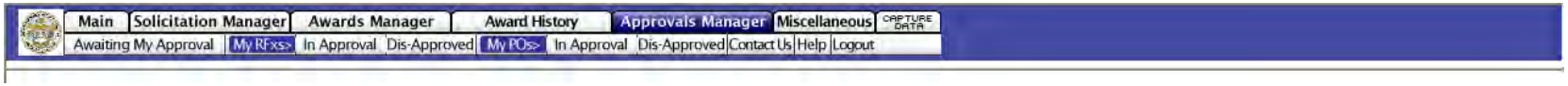
Click from the drop down and click on **Execute Action** to open that functionality



Part 5 – Approvals Manager

This section will describe how to find and view your approval routes and how to check on the status of a solicitation or award that is in approval routing.

To begin click the **Approvals Manager** tab.



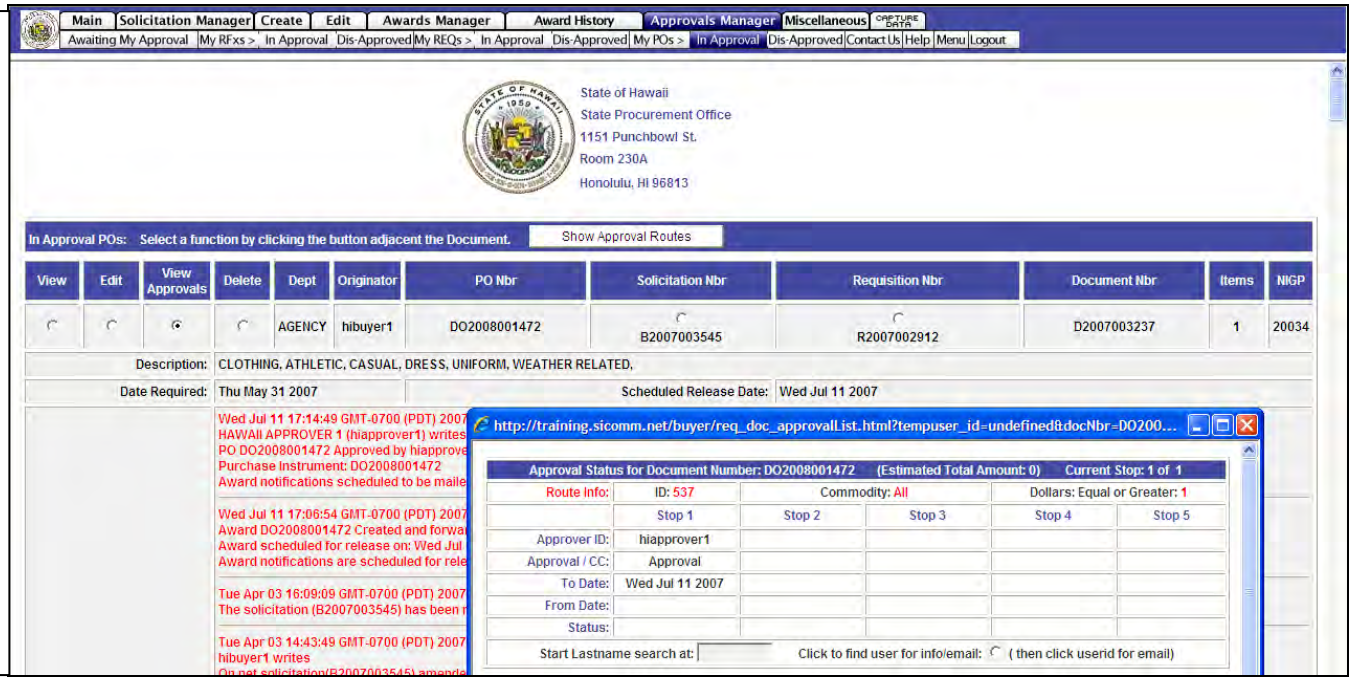
Awaiting My Approval – are documents that you are the approver for. Click on the sub-tab to display a list for your approval.

My RFx's – are your RFQs that need approved by someone else. Click **In Approval** to see those still waiting for approval. Click **Dis-Approved** to work on those that have returned to you as rejected by your approver.

MY POs – are your awards that need approved by someone else. Click **In Approval** to see those still waiting for approval. Click **Dis-Approved** to work on those that have returned to you as rejected by your approver.

This is a sample that shows an award that is still waiting for approval. To see this type of info click on the **View Approvals** button in the blue area on the left of the popup. This is the info for this one particular award,

Additionally you can review all the routes assigned to you by clicking on the white **Show Approval Routes** in the center, This shows all routes assigned to you.

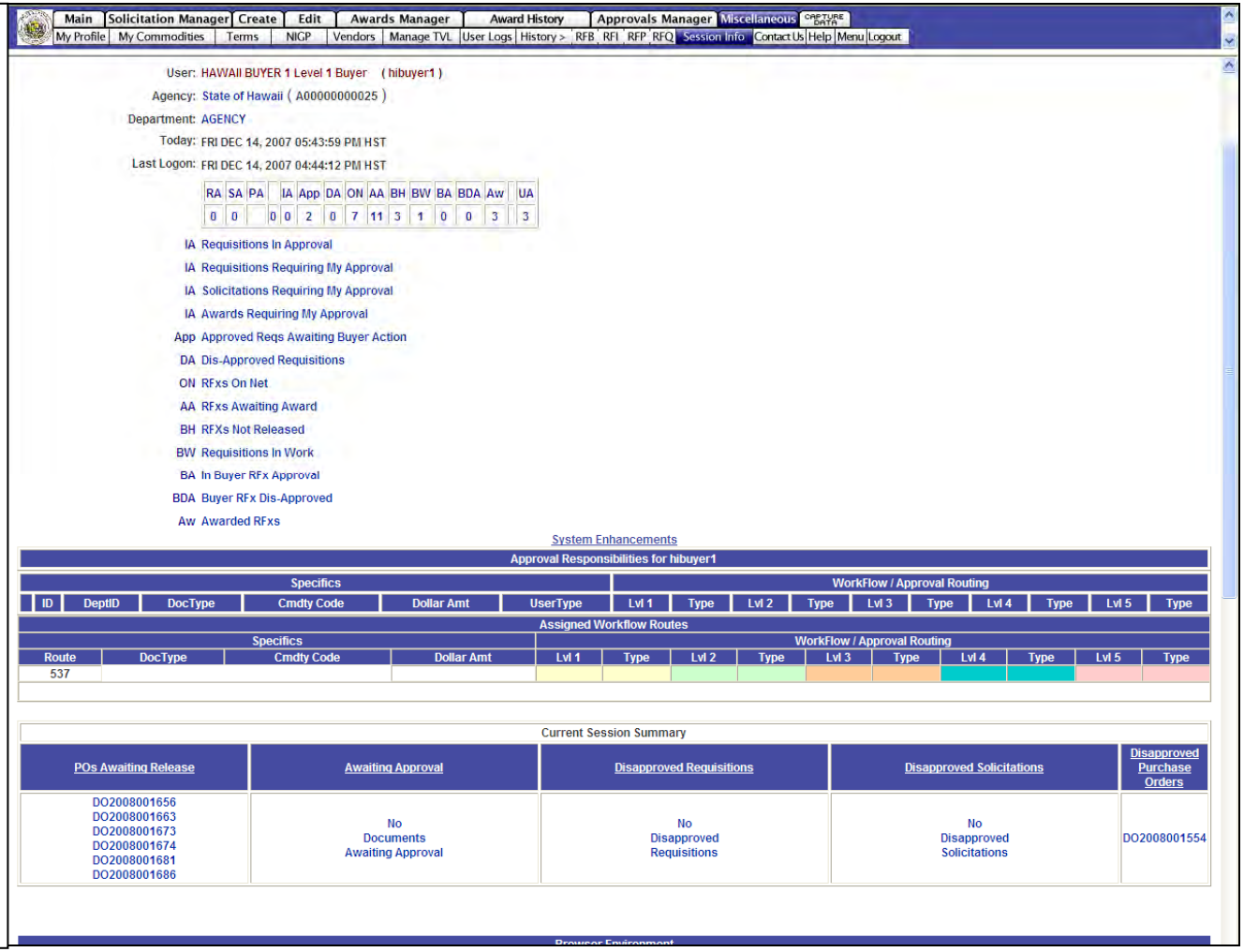


You assigned approval routes are also viewable under **Miscellaneous** tab, **Session Info** sub-tab.

If you have approval routes where you are the approver they will be listed under **Approval Responsibilities**. Approval routes assigned to your documents are listed under **Assigned Workflow Routes.**

In addition this page shows the number of current documents in work and their status.

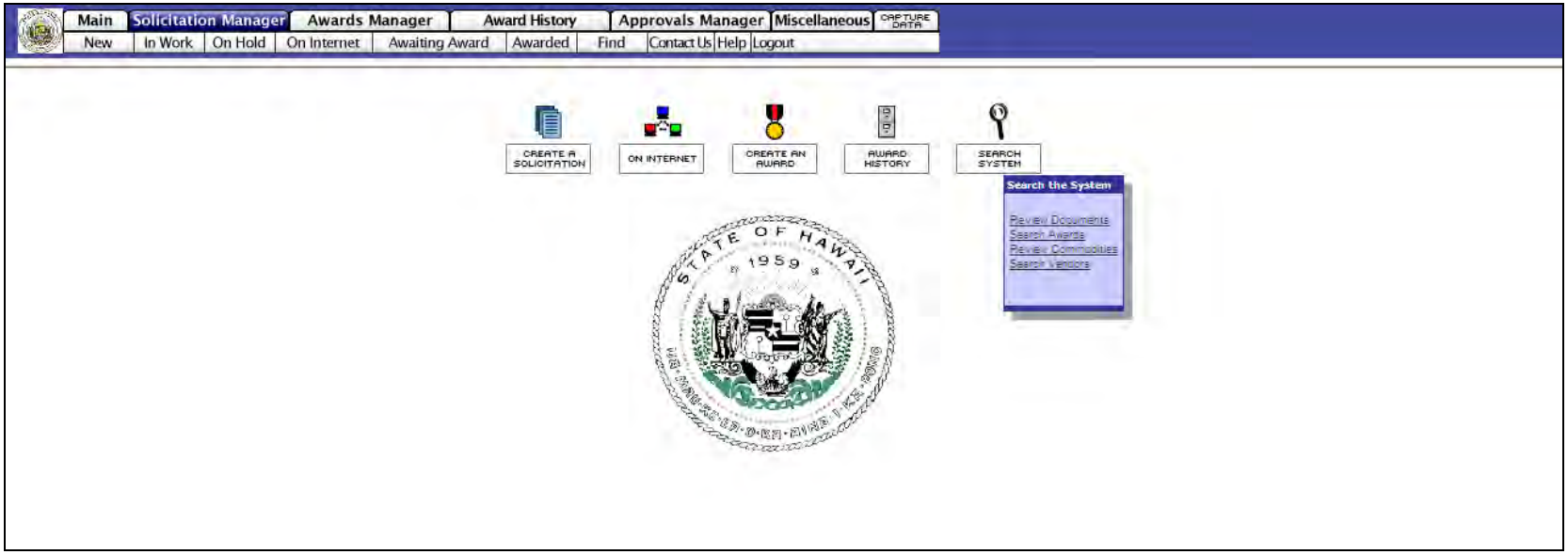
It also has a copy of the login page info – scroll to the bottom to see this info.



Part 6 – Search System

This section will describe how to use the search functions in the system. It includes Review Documents, Review Commodities, Review Notepad, and Review Vendors.

To begin click the **Search System** Icon and choose anything on the popup display.



There are 4 searches all on this same page – scroll down to see each one. Search criteria is entered in the top frame and results appear in the bottom.

Review Documents

Document Type - Pick a document type from the drop down

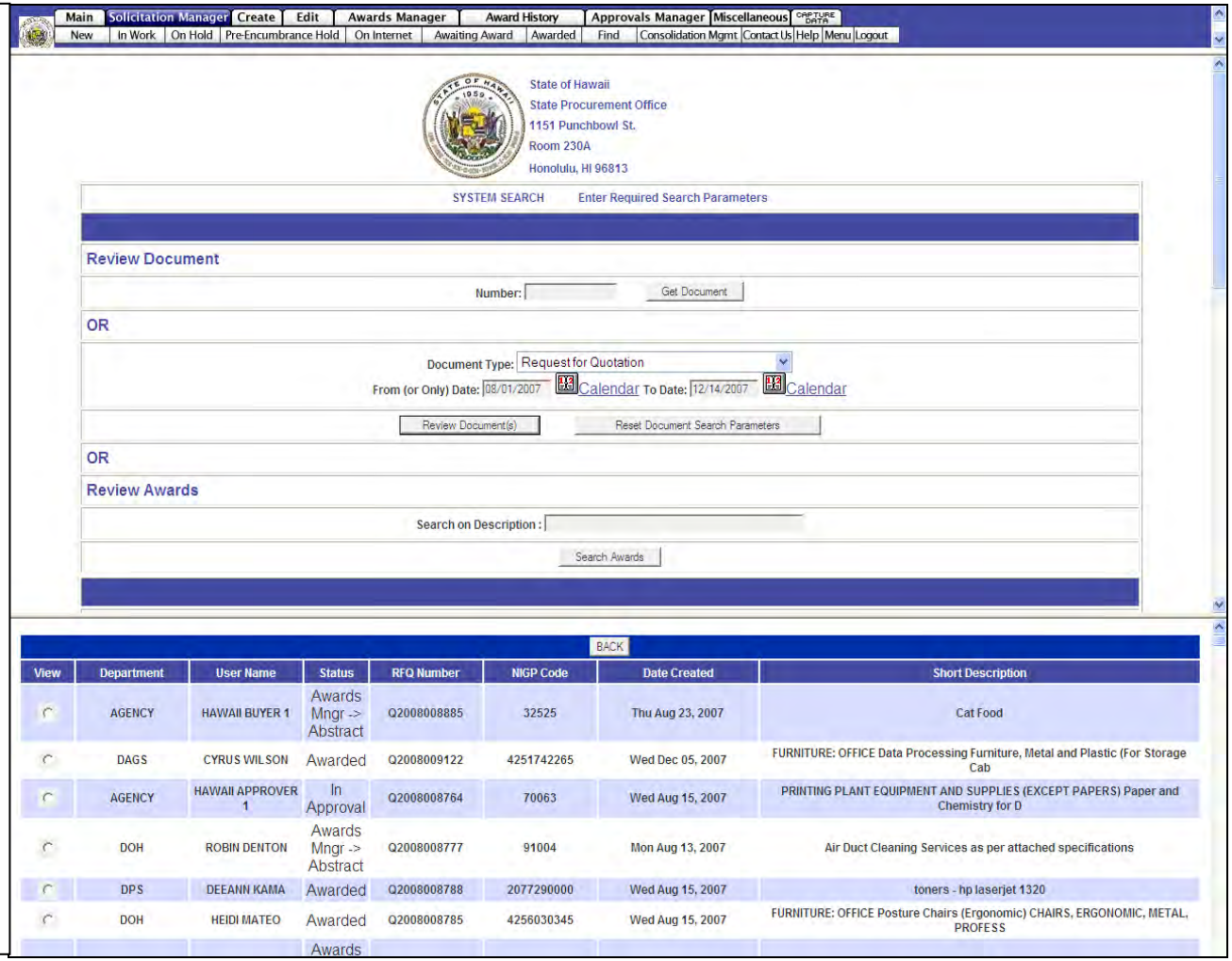
From and To - Select search dates

Click on **Review Documents**

The bottom frame will show all documents found in your search criteria for the time specified

The fourth column will show the current status of the document

This example shows all Request for Quotations between 8-1-07 to 12-14-07.

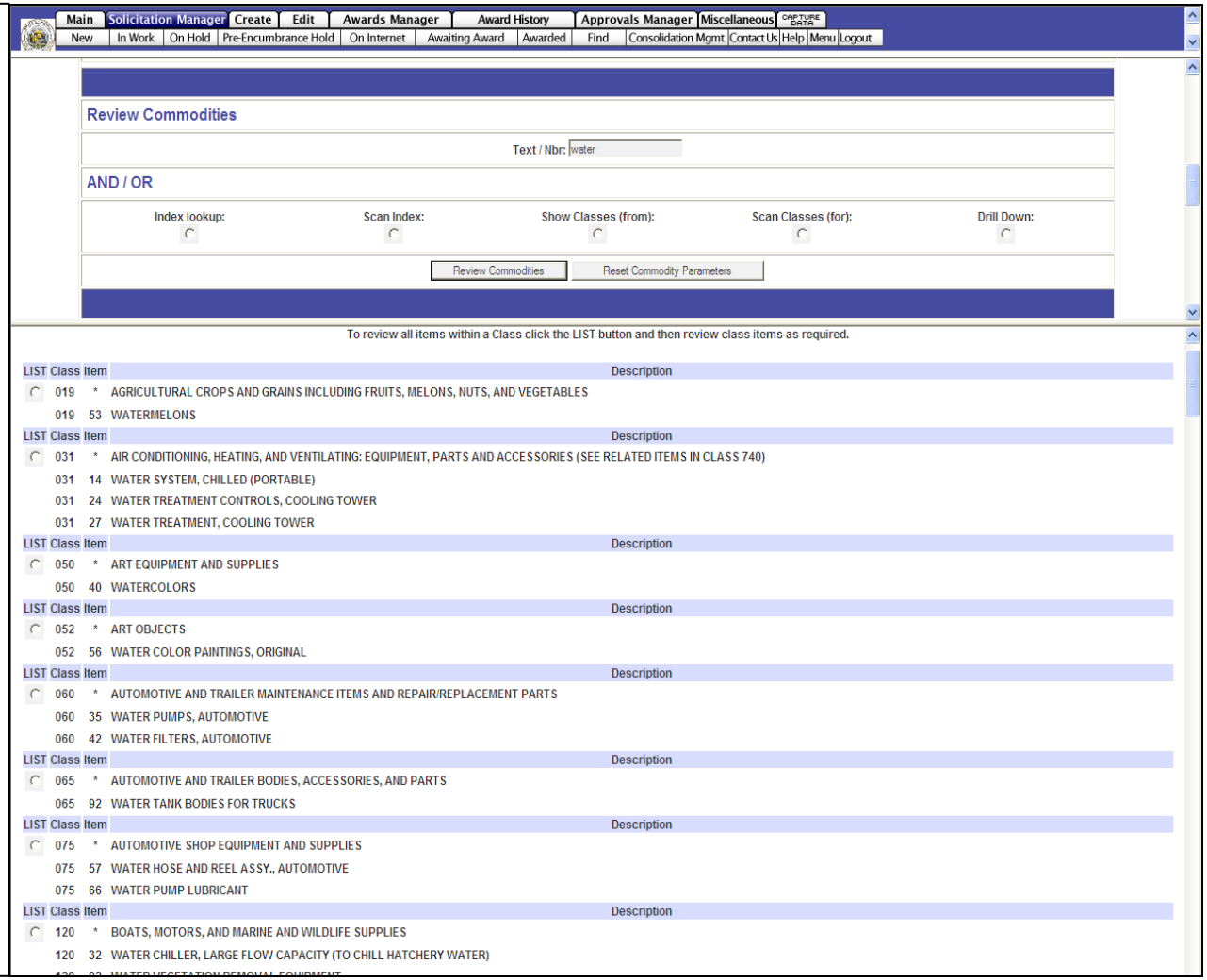


Review Commodities

Text/Number – enter either a wird or the commodity code number and select **Review Commodities** button

Show Classes From – click on the button below Show Classes from to see a complete list of all the top level 3-digit class codes (approximately 260). Click on R**eview Commodities** button

This example shows a search all commodities that contain the word “water”



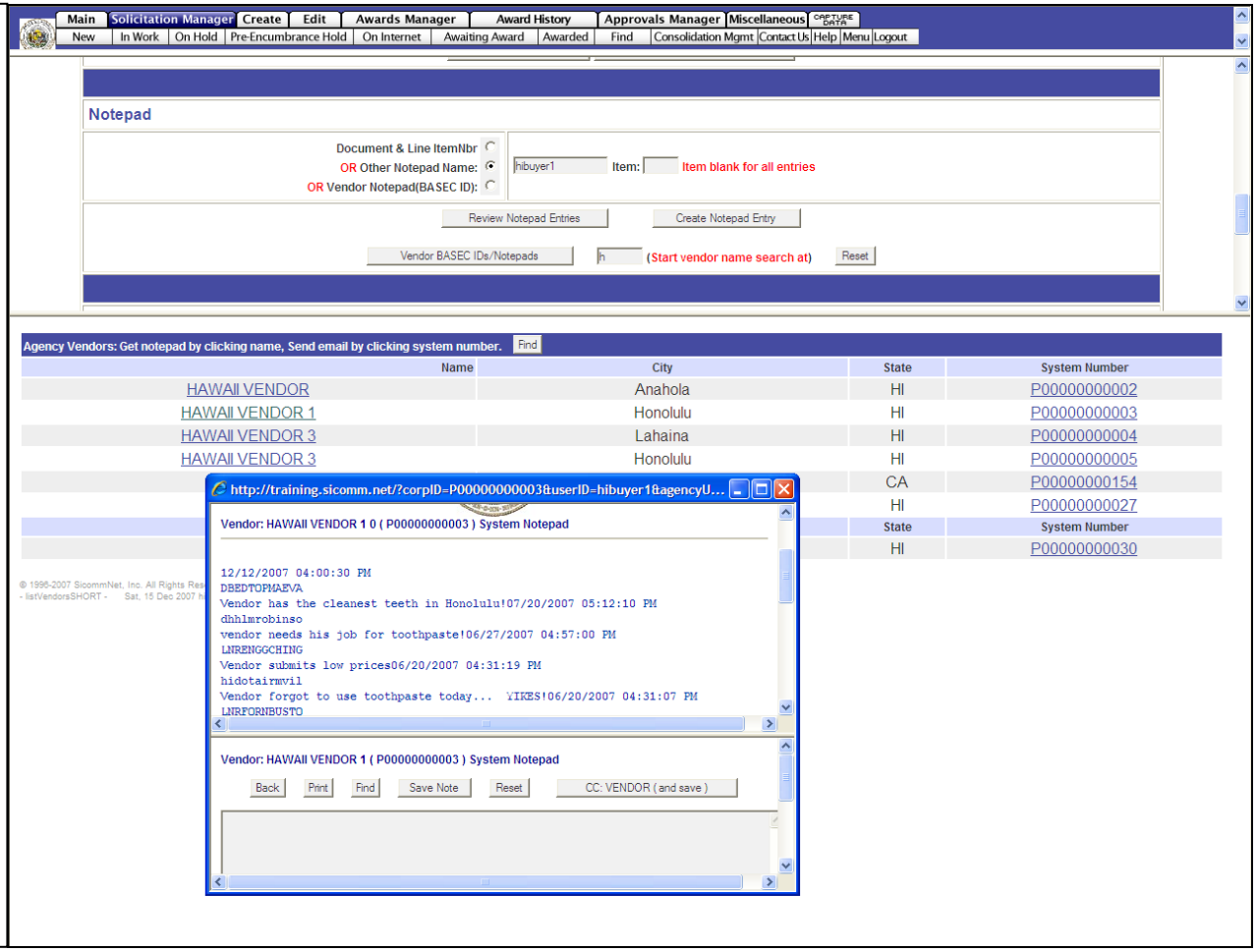
Notepad

Saved notes can be retrieved by entering in information in the search area

Search by Document and Line Item Notes, other notepad entries, or by Vendor Notepad

This example shows notes on Hawaii Vendor 1 that have been entered by buyers

You may enter a new notepad entry and click on **Save Note** in the bottom of the popup window.



Review Vendors

The vendor database may be searched by:

Name

Commodity Code (a number from the search above)

City

County

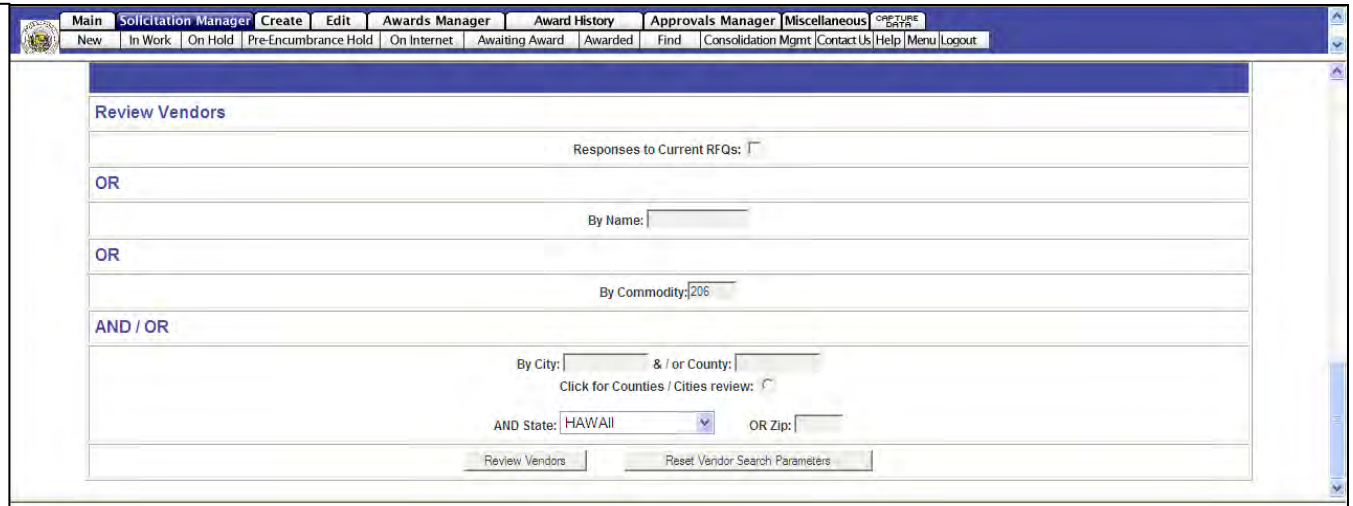
State

Zip

Click on **Review Vendors** to see the results alphabetically in the bottom frame

This example shows vendors for Commodity Code 206 located in the State of Hawaii

Click on **View** to see more information on the specific vendor, including name, address, email, awards, commodity codes, notepad, and profile.



Vendor Listing as of Fri Dec 14 19:27:40 GMT-0800 (PST) 2007

View	Vendor Name	Contact Name	Email	Phone	Fax
○	A LA MODE	Ellen Mode	emode@sicomm.net	808-566-6172	
○	abc	john john	john.john@hawaii.gov	808-596-5162	
○	abc	john john	steve.takahashi@hawaii.gov	808 587-2141	808 587-2141
○	ABC xxxxxxxx	xxxxxxxxx xxxxxxxxx	xxxxxx@xxxxx.com	808 222-2222	
○	HAWAII VENDOR	Aloha Taylor	test7@sicomm.net	123-123-1234	
○	HAWAII VENDOR 1	John Doe	test5@sicomm.net	123-123-1234	
View	Vendor Name	Contact Name	Email	Phone	Fax
○	HAWAII VENDOR 3	John Smith	email@sicomm.net	123-123-1234	
○	HAWAII VENDOR 3	Alice Wonderland	email@sicomm.net	123-123-1234	
○	ROBERT & AMYS COMPANY	Robert Kiessling	robert.kiessling@hawaii.gov	808-587-2034	

9 records returned.
NIGP: 206 State: HI

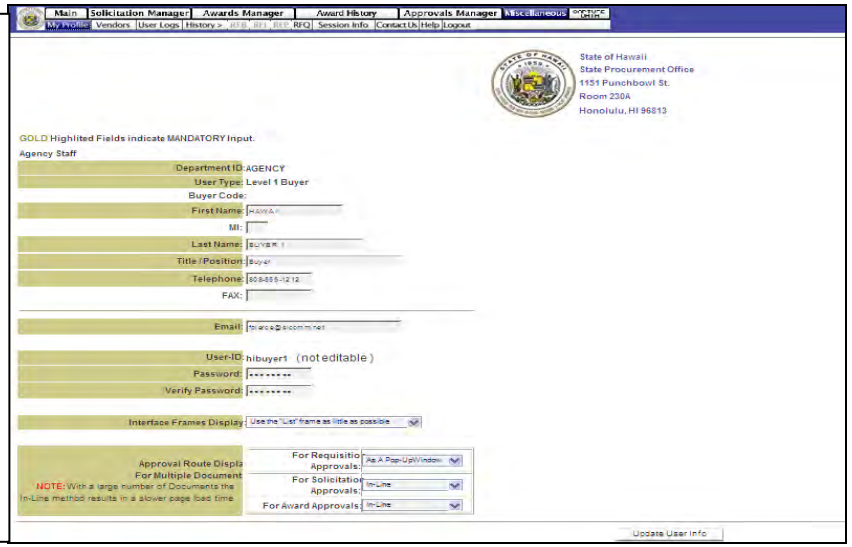
Part 7 – Miscellaneous

This section will describe how to use change your User Profile and Password and find documents you have saved and need to open and work on again.

Profile and Password information is found under **Miscellaneous/My Profiles** on the Menu bar.

Passwords must be at least 7 digits long, contain a minimum of 2 capital letters and 2 numbers.

Click on the **Update User Info** button to apply changes.



When creating a solicitation you may have chosen the option to **Save Item/SAVE AND FILE DOCUMENT**. This saved your requisition under **Solicitation Manager/New**. It is not a RFQ yet, only a requisition. Click on **Manage** to open and continue working on this document and turn it into an RFQ.

After a solicitation has been created there is an option to **File RFQ for Later Action**. Your solicitation can be found again under **Solicitation Manager/On Hold.** Click **Manage** to open and continue working on this document.

If you leave the **Award Input** page while creating a Notice of Award, your vendor selection is saved under **Awards Manager/PO Generator**. Options are to continue to **Create** the award or **Un-Create** the vendor selection and return it to the Abstracts page.